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# AccuRoute Desktop v2.2

## user guide

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## Glossary

# Section 1: Introduction

This section includes:

- [Understanding AccuRoute Desktop](#) (I-1)
- [Introduction to AccuRoute Desktop components](#) (I-2)
- [Related documentation](#) (I-7)
- [About this guide](#) (I-7)

## Understanding AccuRoute Desktop

- [Solving everyday document distribution challenges](#) (I-1)
- [Gaining efficiency and reliability](#) (I-1)
- [Using the most comprehensive solution available for electronic and hard copy documents](#) (I-2)

## Solving everyday document distribution challenges

Imagine you've got a document you need to distribute. Before you leave the office for the day, you need to e-mail it to a colleague, fax it to a client, print it on the office printer, make a photocopy for your files, and add it to your company's document storage system.

You might be able to get all these things done in an hour if you're diligent. But inevitably something takes longer than expected—maybe the printer is low on paper, the client's fax number is busy, the copier jams, or someone needs to see you. As you load more paper into the printer or find the jam in the copier, you realize that there aren't enough hours in your day.

Just when you wish you could develop a super power that would allow you to get all these things done in a flash, AccuRoute Desktop arrives in your workplace. The ultimate document distribution solution, AccuRoute Desktop does all these things in seconds—all from a desktop application that is similar to your e-mail program.

## Gaining efficiency and reliability

How is it possible that desktop software can save you so much time? Meet the Embedded Directive.

AccuRoute Desktop software allows you to create a document distribution, or "Embedded Directive".

An Embedded Directive is reusable. Open the Embedded Directive and use it again, or modify it, and then use it to distribute documents. This saves you time, especially when you have:

- a common group of people and places where you send documents, or
- a common set of documents that you distribute periodically.

Embedded Directives are intelligent and modular. There are lots of business applications where you can use Embedded Directives. Most notably, colleagues and clients can use the Embedded Directives you create to distribute documents anywhere in the world. The accurate document routing technology ensures that your messages are always delivered reliably to the correct destinations.

## Using the most comprehensive solution available for electronic and hard copy documents

When you need to distribute documents—either electronic file attachments or hard copy documents, AccuRoute Desktop enables you to associate the Embedded Directive (document distribution) with your documents. Use either of the following methods:

- For a message with electronic file attachments, send the message using AccuRoute Desktop. Simply click Send just as you would send an e-mail message. AccuRoute Desktop distributes your message immediately using the document distribution information you entered.
- For a message that includes hard copy documents, generate a Routing Sheet. (A Routing Sheet is a cover sheet for your message, and it contains a special code that represents the Embedded Directive, or document distribution data.) Take the Routing Sheet and your hard copy documents to a office machine and scan it. Your company's intelligent AccuRoute software detects the Embedded Directive and distributes your document to the correct locations.

## Introduction to AccuRoute Desktop components

[AccuRoute Desktop](#) (I-3)

[AccuRoutePDF printer](#) (I-4)

[Send To AccuRoute Desktop](#) (I-6)

# AccuRoute Desktop

AccuRoute Desktop is a user application that enables you to distribute electronic and hard copy documents to any combination of recipients and destinations such as e-mail recipients, fax numbers, document repositories and document management applications, records management applications, and network printers.

## **Figure 1-A: AccuRoute Desktop main window**

The main window in AccuRoute Desktop is where you choose recipients and destinations for your documents.



Using AccuRoute Desktop is similar to using any popular e-mail program; however, the application's unique features make AccuRoute Desktop the ultimate document routing solution for the workplace:

- An Embedded Directive, or document distribution, can be saved so that you can reuse the Embedded Directive. This feature saves you time for documents you distribute on a regular basis, such as the agenda for your weekly department meeting.
- The business applications for AccuRoute Desktop are unlimited. AccuRoute Desktop is scalable to handle large or small workloads, and versatile to meet the specific needs of you and your company.
- The files that you distribute can be file attachments from your desktop computer or network share, hard copy documents, or a combination of both.
- You can select the file format of each document you distribute. For example, you can send one document as a PDF file, and another document as a Microsoft Word file that contains the text from your original message.
- AccuRoute messages and Embedded Directives can be associated with billing data, which enables your company to efficiently bill the party responsible for any document routing costs.

- When sent to a fax number, the AccuRoute message can utilize some special features such as preview, approval, and secure fax delivery.
- AccuRoute Desktop is equipped with special features that enable your company to achieve compliance with regulatory standards that affect various industries across the global marketplace.

Two other components, AccuRoutePDF printer and Send to AccuRoute Desktop, are installed as part of AccuRoute Desktop. These components are described in [AccuRoutePDF printer](#) (I-4) and [Send To AccuRoute Desktop](#) (I-6).

## AccuRoutePDF printer

The AccuRoutePDF printer is a component of AccuRoute Desktop.

### **Figure I-B: AccuRoutePDF printer in the Windows Print dialog box**

The Windows Print dialog box displays all the printers that have been added to your computer, including the AccuRoutePDF printer.



Your computer recognizes this printer as an ordinary printer connected to your computer, but this printer performs an extraordinary function. When you are working on a document and you print it on the AccuRoutePDF printer, it instantly converts the document into a PDF file and attaches the PDF file to a new AccuRoute message.



**Figure I-C: AccuRoute Desktop with an attachment from the AccuRoutePDF printer**

When you print a document to the AccuRoutePDF printer, the printer converts the document to a PDF file and attaches it to AccuRoute Desktop. Then you can choose the recipients and destinations for your document and then send it.



Use this convenient feature to create an AccuRoute message based on the document that is open on your desktop. Additionally, you can send any AccuRoute message to your personal e-mail address. This capability provides you with a handy method of converting your business documents into PDF format.

## Send To AccuRoute Desktop

Send To AccuRoute Desktop is a Windows shortcut. The Send To AccuRoute Desktop option appears when you right-click on a file as you browse the files on your computer and on the network.

### **Figure I-D: Send To AccuRoute Desktop shortcut**

When you right-click on a document on your computer or network the Send To AccuRoute Desktop option appears in the right-click menu.



When you select Send To AccuRoute Desktop, AccuRoute Desktop prompts you to choose how you want to use this file. AccuRoute Desktop can attach the file to a new AccuRoute message, or distribute the file immediately using one of your Embedded Directives.

### **Figure I-E: Send To AccuRoute Desktop menu**

When using the Send To AccuRoute Desktop option, you are prompted to select the method you want to use to distribute your document. You can attach the file to a new AccuRoute message, or distribute the file immediately using one of your Embedded Directives.



If you choose to attach this file to a new Embedded Directive, AccuRoute Desktop attaches the file to a new AccuRoute message. If you choose to distribute this file immediately using an existing Embedded Directive, AccuRoute Desktop sends your message immediately.

## Related documentation

The AccuRoute Desktop Quick Start Guide is available for download at:

<http://www.omtool.com/documentation/accuroute/v22/accuroutedesktop/AccuRouteDesktopV22QuickStartGuide.pdf>

This one-page document illustrates the basic steps required to create an AccuRoute message. Print this document and keep it nearby so that you can refer to it as you are learning to use the application.

## About this guide

This guide contains detailed information on using the features in the AccuRoute Desktop application suite. It is written for AccuRoute Desktop users, and presumes a basic working knowledge of a computer running Windows.

AccuRoute Desktop is installed, configured, and maintained entirely by the IT professionals in your company. The application is highly configurable and allows your company to customize it readily. To this extent, you might require the assistance of a network administrator to set up and use some of the features described herein. Additionally, some of the features described in this guide might not be available to you.



# Section 2: Learning the basics of AccuRoute Desktop

This section includes:

[Getting started](#) (2-1)

[Starting AccuRoute Desktop](#) (2-2)

[Working with simple messages](#) (2-3)

[Working with Embedded Directives](#) (2-14)

[Working with Routing Sheets and hard copy documents](#) (2-16)

[Using the AccuRoutePDF printer](#) (2-18)

[Using the Send To AccuRoute Desktop shortcut](#) (2-21)

[Exiting AccuRoute Desktop](#) (2-23)

## Getting started

AccuRoute Desktop provides you with several methods of sending AccuRoute messages:

- **Sending casual messages from your desktop** - Send common AccuRoute messages similar to the way you send e-mail messages—create the message and click Send. (This method of sending AccuRoute messages requires at least one recipient/destination and at least one attachment.)
- **Sending standard messages from your desktop** - When you need to distribute an AccuRoute message on a regular basis to the same group of recipients, create an AccuRoute message and save it as an Embedded Directive. (An Embedded Directive is a saved document distribution profile.) For example, suppose you need to send out meeting minutes to a large group of people on a weekly or monthly basis. Create an AccuRoute message and save it as an Embedded Directive so that you can use this Embedded Directive each time you need to distribute the meeting minutes. Embedded Directives can be updated, so that if the group of recipients changes, you can update it easily.
- **Sending hard copy documents** - When the documents you need to distribute are hard copy documents, or a combination of hard copy and electronic documents, create an Embedded Directive and then generate a Routing Sheet. Print the Routing Sheet and scan it with the documents you need to distribute. (Consult a network administrator to find out which scanners have been designated for this purpose.)

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**Note** You must create an AccuRoute message, or open an existing message, before you can create Embedded Directives.

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To begin creating AccuRoute messages and Embedded Directives, continue to [Starting AccuRoute Desktop](#), and then go to [Working with simple messages](#) (2-3).

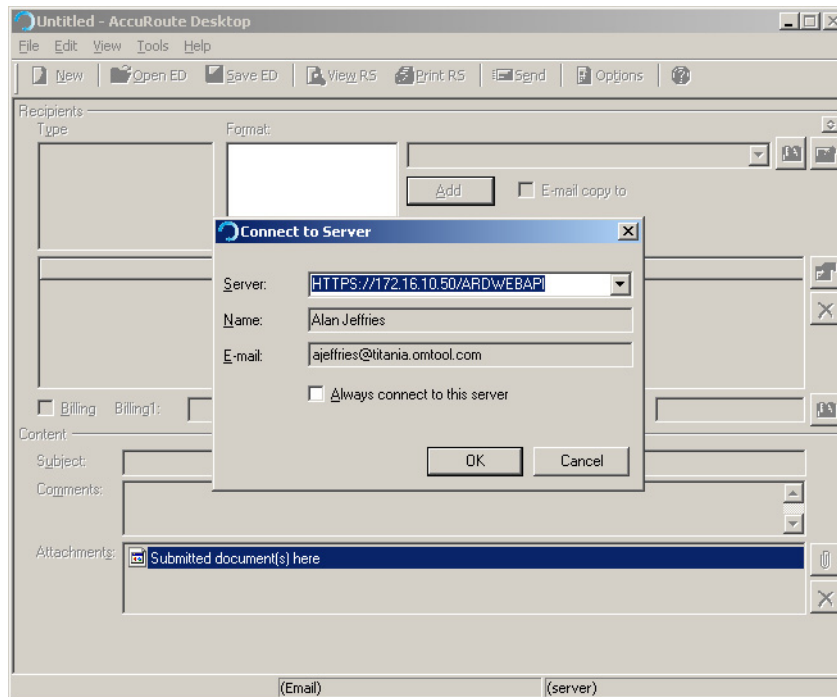
# Starting AccuRoute Desktop

## To start AccuRoute Desktop:

- I Go to Start > Programs > Omtool > AccuRoute Desktop.

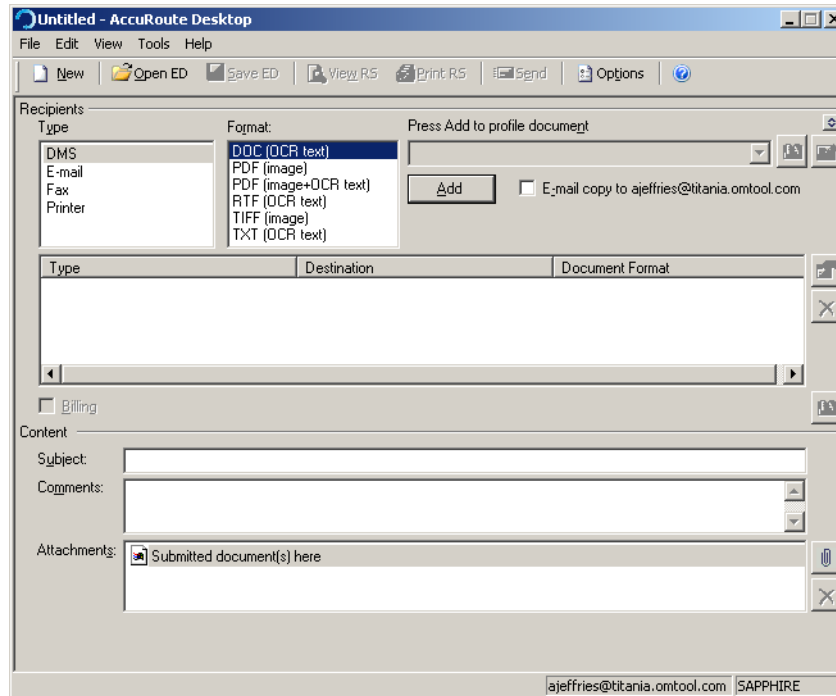
Depending on the way AccuRoute Desktop login has been set up, you might be required to log in to your mail program before you can use AccuRoute Desktop. If prompted, log in to your mail program and then continue.

The **Connect To Server** dialog box appears. (This dialog box does not appear if the application has been configured by a network administrator to start automatically.) All, some, or none of the fields in the Connect To Server dialog box might already contain login information.



- 2 Log in to AccuRoute Desktop:
  - a To complete the **Server** field (if necessary): Enter the address of your company's AccuRoute server. This information is provided by your network administrator.
  - b To complete the **Name** field (if necessary): Enter your full name.
  - c To complete the **E-mail** field (if necessary): Enter your e-mail address. (If you have multiple e-mail addresses, enter the e-mail address that you want to use when sending AccuRoute messages. If login is unsuccessful, consult your network administrator. You might be required to use a specific e-mail address.)

- d Select **ALWAYS CONNECT TO THIS SERVER** if you want to log in automatically to the server that is listed in the **Server** field. When you select this option, AccuRoute Desktop starts automatically and you are no longer prompted to log in.
- e Click **CONNECT**. AccuRoute Desktop appears on your desktop. The application window should look similar to the window shown here.



Notice that your e-mail address and server name are visible in the bottom right corner of the window.

Now you are ready to create an AccuRoute message. Continue to [Working with simple messages](#).

## Working with simple messages

AccuRoute Desktop is similar to an e-mail program. In its most simple mode, AccuRoute Desktop can send messages immediately, just as you might prepare and send a common e-mail message. AccuRoute Desktop can also save the message settings as an Embedded Directive so you can send the message again later, and use the message settings to create new messages and Embedded Directives.

[Creating an AccuRoute message \(2-4\)](#)

[Sending an AccuRoute message immediately \(2-11\)](#)

[Saving an AccuRoute message as an Embedded Directive \(2-12\)](#)

## Creating an AccuRoute message

[Selecting features for your message using Message Options \(optional\)](#) (2-4)

[Selecting a recipient or destination for the message \(required\)](#) (2-5)

[Selecting features and setting properties for a recipient or destination \(optional\)](#) (2-7)

[Associating billing data with the message](#) (2-8)

[Specifying a subject for the message and comments for recipients \(optional\)](#) (2-8)

[Attaching files to the message \(optional\)](#) (2-8)

### Selecting features for your message using Message Options (optional)

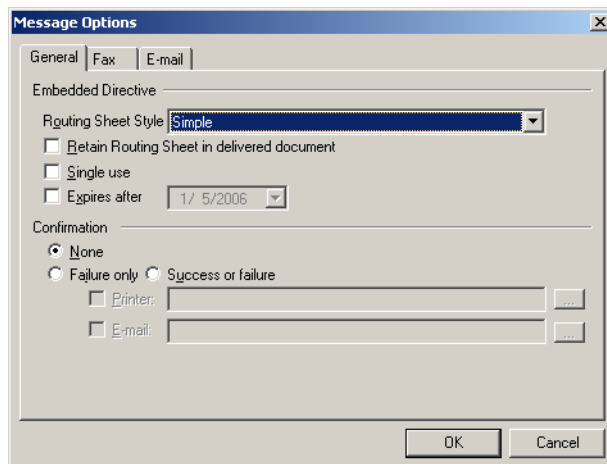
The first step in creating an AccuRoute message is to set the message options. The message options are a collection of special features that you can select for the message. This includes general options that apply to the message, options that apply only to fax recipients, and options that apply only to e-mail recipients.

When you change the message options, your changes are saved with the message you are working on. If you start a new message, the message options are reset based on your preferences and your company's AccuRoute Desktop configuration. (Go to [Setting preferences](#) on 3-1.)

#### To select options for your message:

- I Do one of the following:
  - ▶ Click **OPTIONS**.
  - ▶ Click **TOOLS > MESSAGE OPTIONS**.
  - ▶ Press **CTRL+T**.

The **Message Options** dialog box displays the **General** tab.





- 2 Configure the options on the **General** tab as desired. For more information on the features in this dialog box, consult [General tab](#) (A-1).
- 3 Go to the **Fax** tab, and configure the options for fax recipients as desired. For more information on the features in this dialog box, consult [Fax tab](#) (A-3).
- 4 Go to the **E-mail** tab, and configure the options for e-mail recipients as desired. For more information on the features in this dialog box, consult [E-mail tab](#) (A-5).
- 5 Click **OK** to save the message options.

### Selecting a recipient or destination for the message (required)

Your message must have at least one recipient or destination. Examples of recipients and destinations are e-mail addresses, fax numbers, network printers, document management systems, and document repositories. A network administrator configures the types of recipients and destinations that you can choose for your messages, so any combination of these options can be available in AccuRoute Desktop.

#### To select a recipient or destination for the message:

- 1 Locate the **Recipients** section near the top of the window. This is where you need to identify the recipients and destinations where you want to send the message.
- 2 Locate the **Type** menu and select the type of recipient or destination where you want to send the message. For example, if you want to send the message to your colleague's e-mail address, select **E-MAIL**. If you want to send the message to a client's fax number, select **FAX**. (The destination types are configured by a network administrator, so you can have any number of destination types to choose from.)
- 3 Choose a file format for your message. For example, if you want to send your message as a PDF file, select **PDF (IMAGE)**. Keep in mind that the format you choose applies only to the destination that you are adding.

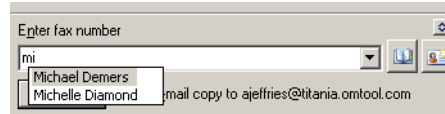
The menu of file formats is configured by a network administrator. The most common ones include:




- ▶ **DOC (OCR TEXT)** - Produces a Microsoft Word document that contains the text from your original message.
- ▶ **PDF (IMAGE)** - Produces a PDF file.
- ▶ **PDF (IMAGE+OCR TEXT)** - Produces a PDF file that is searchable.
- ▶ **RTF (OCR TEXT)** - Produces a Rich Text Format document that contains the text from your original message.
- ▶ **TIFF (IMAGE)** - Produces a single TIFF file that contains as many pages as your original message.
- ▶ **TXT (OCR TEXT)** - Produces a simple text document that contains the text from your original message.

Consult your network administrator if you have questions on the format of your message.

- 4** Specify the destination address. Do one of the following:
- ▶ Enter the destination address in the address field and click **ADD**.

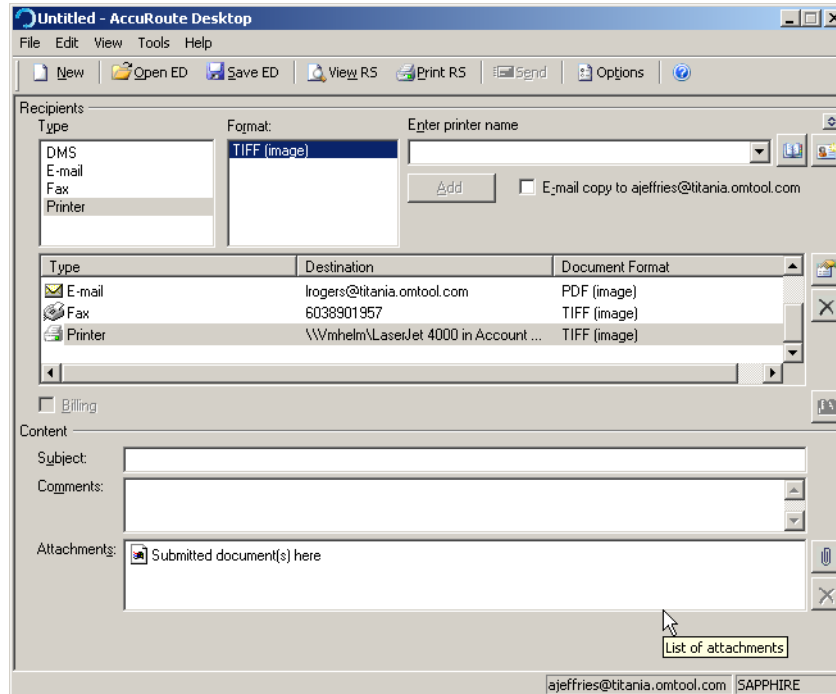
*Tip* Note that if you are using AccuRoute Desktop and Microsoft Outlook is your mail program, then AccuRoute Desktop display the contact names of the contacts that match your entry. As you begin typing and then pause, AccuRoute Desktop shows you all matches in your Outlook address lists and allows you to select one. An example is shown here:



- ▶ Click the **Browse for recipients** button , select a contact, and click **OK**.
- ▶ Click the **Create new recipient** button , enter the destination address and any other known details about the destination, and click **OK**.
- ▶ Click the menu button  and select a destination address from the list of recently used addresses.
- ▶ Enter the destination address in the format name@faxnumber, for example, John Smith@890-1957. This method works only for fax recipients.

The destination for the message appears below.

*Note* When the destination for your message is your company's document management system or document repository, then you might be required to provide information on the message; this information indicates how your message should be saved. The window(s) should be completely familiar to you; AccuRoute Desktop simply opens the application that you normally use to add documents to your company's document management system or document repository.




## Selecting features and setting properties for a recipient or destination (optional)

After you have added a recipient or destination to your message, you can change the message options as they apply to an individual recipient or destination.

This step is optional, but recommended if either of the following is true:

- You want to use a special feature with a recipient or destination.
- You are including a Routing Sheet or cover sheet with your message. Because Routing Sheets and cover sheets can be configured to display information about the recipient or destination, you should make sure that you have provided as much information as possible about each recipient and destination. (The information that appears on Routing Sheets and cover sheets is configured by your network administrator.)

### To change the message options for a recipient or destination:

- 1 Do one of the following:
  - ▶ Double-click the recipient or destination.
  - ▶ Select the recipient or destination and click the properties button .
  - ▶ Right-click the recipient or destination and select **PROPERTIES**.
- 2 Configure the options as desired. For more information on these options, consult [Features for recipients and destinations](#) (B-1).
- 3 Click **OK** to save your changes.

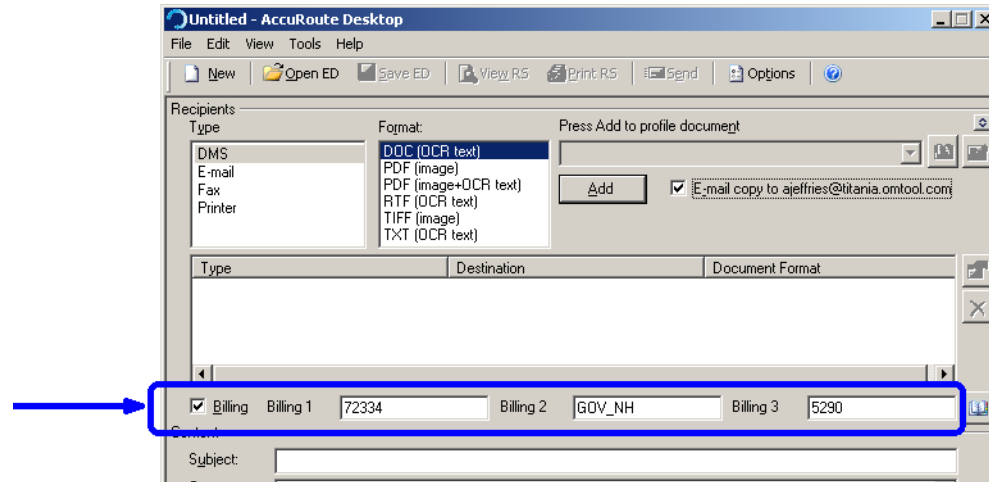
## Associating billing data with the message

Depending on whether billing options are available to you and how they have been configured, the steps for associating billing data with the message vary. For example, if billing fields are available, you might be required to complete them, or these fields might be optional for your messages.

When the billing fields are available, they are located below the list of recipients and destinations.

### Figure 2-A: Billing fields in AccuRoute Desktop

Billing fields appear in AccuRoute Desktop if your company uses billing data.



Consult your network administrator if you need assistance with this feature.

## Specifying a subject for the message and comments for recipients (optional)

AccuRoute messages support a subject and comments for the recipient. These are optional.

The subject and comments can be used in the following ways:

- The subject and comments can appear on the Routing Sheet or cover sheet if one is included with your message, and if the Routing Sheet or cover sheet has been configured to display the subject and comments.
- When the AccuRoute message is sent to an e-mail recipient, your subject is included as the subject of the e-mail message and your comments are included in the body of the e-mail message.

### To indicate a subject for your message:

Enter a subject for your message in the **Subject** field.

### To add comments to your message:

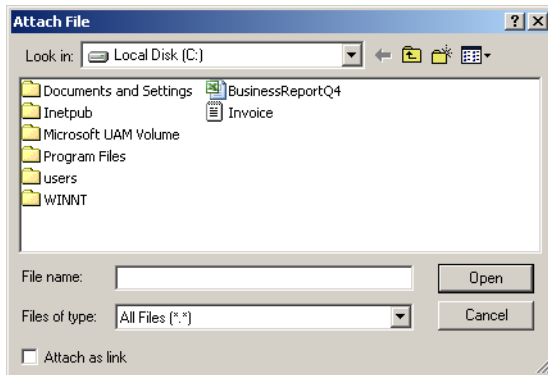
Enter comments for message recipients in the **Comments** field.

## Attaching files to the message (optional)

Just as you can add file attachments to an e-mail message, you can add file attachments to your AccuRoute message. As soon as you add an attachment, it appears in the attachments list near the bottom of the window.

### To attach a file that is saved on your computer or network:

- 1 Click the **Add new attachment** button  and select **FILE**. The **Attach File** dialog box appears.



- 2 Go to the file and select it.

Use the following guidelines when attaching a file:

- ▶ Attach any text-based file or word processing document.

---

*Tip* Use this simple test when you're trying to determine whether you can attach a file to an AccuRoute message. Suppose you have a printer next to your computer. Would you be able to print the file on the printer? If the answer is yes, then you can attach the file to an AccuRoute message.

The reason for this test is that AccuRoute Desktop uses a process similar to the printing process to prepare your AccuRoute message and send it. This is why you cannot attach multimedia files such as MP3 files (sound) and MPG files (video).

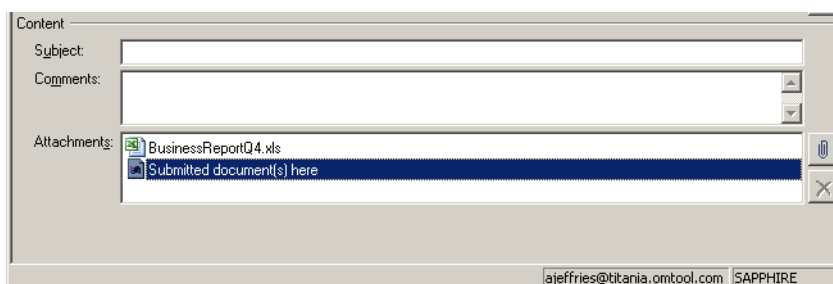
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- ▶ When you need to attach a file on the network, go to the file via **My Network Places > Entire Network > Microsoft Windows Network**.

- 3 Determine whether you want to attach the file to your message or simply link your message to the file.

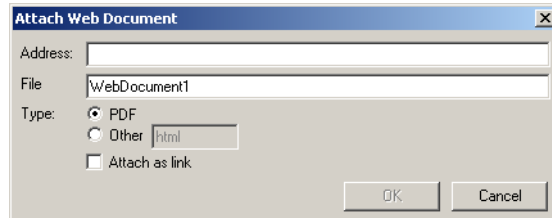
- ▶ Continue to the next step if you want to save the file in its current state with your message.
- ▶ Select **ATTACH AS LINK** if you want to link your message to the file. When this option is selected, AccuRoute Desktop remembers the location of your file and retrieves the most current version of the file whenever you send your message.

- 4 Click **OPEN**. AccuRoute Desktop attaches the file to your message.



**To attach a web document:**

- 1 Click the **Add new attachment** button  and select **WEB DOCUMENT**. The **Attach Web Document** dialog box appears.



- 2 Enter the web address, or URL, of the web page in the **Address** field. (If you do not know the address of the web document, open your browser, go to the page you want to attach, copy the web address of the page and paste it here.)

Use the following guidelines when attaching a web document:

- ▶ The file you want to attach can be located on the World Wide Web, on your company's intranet or extranet, or on an FTP site.
- ▶ Use the complete path to the file (for example, <http://www.mywebsite.com/myaccount/statements/currentstatement/statement.pdf>) or a partial path that automatically resolves to the web document you want to attach (for example, <http://www.mywebsite.com/myaccount/statements/currentstatement/>).
- ▶ Attach any web document that is a text-based file or word processing document.

---

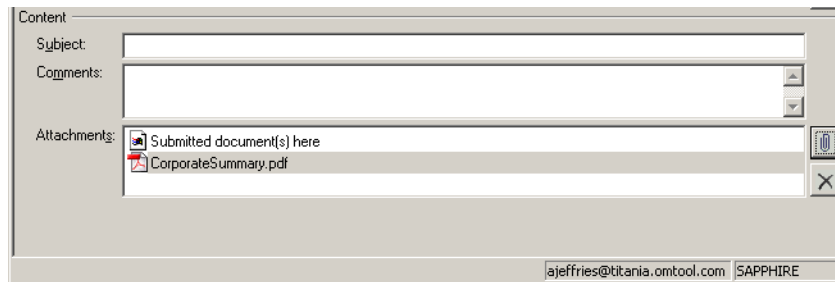
*Tip* Use this simple test when you're trying to determine whether you can attach a web document to an AccuRoute message. Suppose you have a printer next to your computer. Would you be able to print the web document on the printer? If the answer is yes, then you can attach the web document to an AccuRoute message.

The reason for this test is that AccuRoute Desktop uses a process similar to the printing process to prepare your AccuRoute message and send it. This is why you cannot attach multimedia files such as MP3 files (sound) and MPG files (video).

---

- ▶ Do not attach a web document using a URL that redirects your browser to another page.
- 3 Enter a friendly name for the attachment in the **File** field.  
The filename is required. It determines the filename of the web document that is delivered with your message.
  - 4 Indicate the type of web document you are attaching. (This is the file extension.)
    - ▶ Accept **PDF** if the web document is a PDF file.
    - ▶ Select **OTHER** and enter the file extension of the web document in the field. For example, if the web document is a Microsoft Word file, type [doc](#).

- 5 Determine whether you want to attach the web document to your message or simply link your message to the web document.
  - ▶ Continue to the next step if you want to save the web document in its current state with your message.
  - ▶ Select **ATTACH AS LINK** if you want to link your message to the web document. When this option is selected, AccuRoute Desktop remembers the location of the web document and retrieves the most current version of the web document whenever you send your message.
- 6 Click **OK**. AccuRoute Desktop attaches the web document to your message in the file format you specified.



## Sending an AccuRoute message immediately

Just as you can send a message from your e-mail program, you can send a message or Embedded Directive in AccuRoute Desktop. Simply click Send.

---

**Note** The message or Embedded Directive must have at least one recipient or destination and at least one attachment. When these requirements are not met, the Send button is not available.

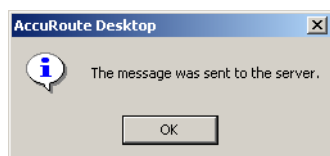
---

Even after you send the message or Embedded Directive, you can save it as an Embedded Directive so that you can send the same message again—as many times as you want.

**To send a message immediately:**

- 1 Create a new message ([Creating an AccuRoute message](#), 2-4), or open an Embedded Directive ([Opening an Embedded Directive](#), 2-14).
- 2 Review the message or Embedded Directives, and make any necessary changes.
- 3 Do one of the following:
  - ▶ Click **SEND**.
  - ▶ Click **FILE > SEND**.
  - ▶ Press **CTRL+E**.

AccuRoute Desktop displays a confirmation message that your message has been sent.



- 4 Click **OK** to close the message box.

## Saving an AccuRoute message as an Embedded Directive

You should save your message as an Embedded Directive for any of the following reasons:

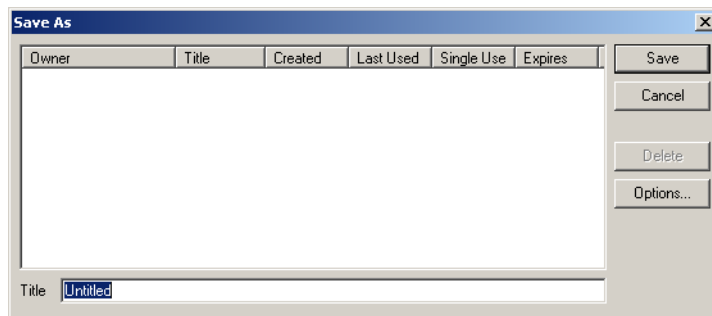
- A hard copy document must be included as part of the message. (When you include a hard copy document with your message, you must scan the message on a copier or scanner, and include a Routing Sheet. Before you can generate a Routing Sheet for a message, you must save the message as an Embedded Directive.)
- If you want to set up My AccuRoute with a default Embedded Directive, you must first save the message as an Embedded Directive.
- The message will be sent again—either by you, a colleague, or a client.
- The Embedded Directive will be used as a basis for creating new messages or Embedded Directives.



**To save a message as an Embedded Directive:**

- 1 Create a new message. (Go to [Creating an AccuRoute message](#) on 2-4.)
- 2 Do one of the following:
  - ▶ Click **SAVE ED**.
  - ▶ Click **FILE > SAVE ED**.
  - ▶ Press **CTRL+S**.

The **Save As** dialog box appears. It displays any Embedded Directives that you have previously saved. The example shown here with no Embedded Directives listed is what the dialog box looks like the first time you save an Embedded Directive.



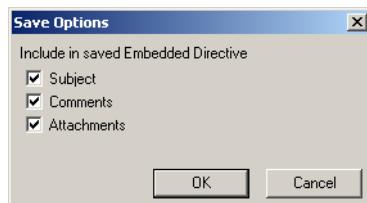
- 3 Enter a title for the Embedded Directive in the **Title** field.

---

**Note** Choose a unique, meaningful title. The title is the primary method you use to manage all your Embedded Directives.

---

- 4 Click **OPTIONS**. The **Save Options** dialog box appears.



Select the items that should be included when AccuRoute Desktop saves the Embedded Directive, and click **OK**.

- 5 Click **SAVE**.

# Working with Embedded Directives

[Opening an Embedded Directive \(2-14\)](#)

[Updating and saving an Embedded Directive \(2-15\)](#)

[Creating a new Embedded Directive from an existing Embedded Directive \(2-15\)](#)

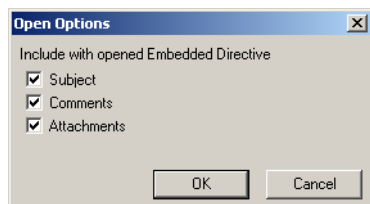
## Opening an Embedded Directive

### To open an Embedded Directive:

- 1 Start AccuRoute Desktop.
- 2 Do one of the following:
  - ▶ Click **OPEN ED**.
  - ▶ Click **FILE > OPEN ED**.
  - ▶ Press **CTRL+O**.

The **Open Embedded Directive** dialog box appears.

- 3 Select the Embedded Directive you want to open.
- 4 Click **OPTIONS**. The **Open Options** dialog box appears.



Select the items that should be included when AccuRoute Desktop opens the Embedded Directive, and click **OK**.

- 5 Click **OPEN** on the **Open Embedded Directive** dialog box. AccuRoute Desktop opens the Embedded Directive on the desktop.

Now that the Embedded Directive is open, you might want to send it immediately, generate a Routing Sheet so you can send a hard copy document, modify the Embedded Directive and save it, or modify the Embedded Directive and save it as a new Embedded Directive.

## Updating and saving an Embedded Directive

### To update and save an existing Embedded Directive:

- 1 Open the Embedded Directive if necessary. (Go to [Opening an Embedded Directive](#) on 2-14.)
- 2 Update the Embedded Directive as desired.
- 3 Do one of the following:
  - ▶ Click **SAVE ED**.
  - ▶ Click **FILE > SAVE ED**.
  - ▶ Press **CTRL+S**.

AccuRoute Desktop saves the Embedded Directive, and the **SAVE ED** button becomes unavailable.

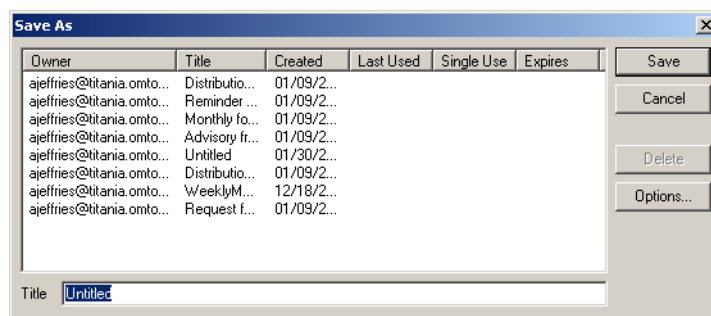
Now that you have saved the Embedded Directive, you can send a message immediately ([Sending an AccuRoute message immediately](#), 2-11), generate a Routing Sheet so you can send a hard copy document ([Printing a Routing Sheet](#), 2-17), modify the Embedded Directive and save it ([Updating and saving an Embedded Directive](#), 2-15), or modify the Embedded Directive and save it as a new Embedded Directive ([Creating a new Embedded Directive from an existing Embedded Directive](#), 2-15).

## Creating a new Embedded Directive from an existing Embedded Directive

When you save an Embedded Directive as a new Embedded Directive, there are two Embedded Directives, each with a different title.

### To save an Embedded Directive as a new Embedded Directive:

- 1 Open an Embedded Directive if necessary. (Go to [Opening an Embedded Directive](#) on 2-14.)
- 2 Edit the Embedded Directive as desired.
- 3 Click **FILE > SAVE AS NEW ED**. The **Save As** dialog box appears. It displays any Embedded Directives that you have previously saved.



- 4 Enter a title for the Embedded Directive in the **Title** field.

---

**Note** Choose a unique, meaningful title. The title is the primary method you use to manage all your Embedded Directives.

---

- 5 Click **SAVE**.

Now that you have saved the Embedded Directive, you can send a message immediately ([Sending an AccuRoute message immediately](#), 2-11), generate a Routing Sheet so you can send a hard copy document ([Printing a Routing Sheet](#), 2-17), modify the Embedded Directive and save it ([Updating and saving an Embedded Directive](#), 2-15), or modify the Embedded Directive and save it as a new Embedded Directive ([Creating a new Embedded Directive from an existing Embedded Directive](#), 2-15).

## Working with Routing Sheets and hard copy documents

[Viewing a Routing Sheet](#) (2-16)

[Printing a Routing Sheet](#) (2-17)

### Viewing a Routing Sheet

#### To view a Routing Sheet:

- 1 Create an Embedded Directive ([Creating a new Embedded Directive from an existing Embedded Directive](#), 2-15), or open an existing Embedded Directive ([Opening an Embedded Directive](#), 2-14).
- 2 Do one of the following:
  - ▶ Click **VIEW RS**.
  - ▶ Click **FILE > VIEW RS**.
  - ▶ Press **CTRL+W**.

The PDF viewing application installed on your computer displays the Routing Sheet.

If you want to use the Routing Sheet immediately to send a hard copy message, print the Routing Sheet. Continue to [Printing a Routing Sheet](#).

## Printing a Routing Sheet

### To print a Routing Sheet:

- 1 Create an Embedded Directive, or open an existing Embedded Directive.
- 2 Do one of the following:
  - ▶ Click **PRINT RS**.
  - ▶ Click **FILE > PRINT RS**.
  - ▶ Press **CTRL+P**.

Depending on the way your Routing Sheet printing preferences are configured, AccuRoute Desktop either sends the Routing Sheet to the printer or prompts you to print the Routing Sheet.

- 3 Go to the printer and retrieve the Routing Sheet.

Now that you have printed the Routing Sheet, you can send your document from a network scanning device. The instructions for sending messages always vary, depending on how this product is configured in your company and which device model your company uses. Consult your network administrator for instructions on scanning your message.

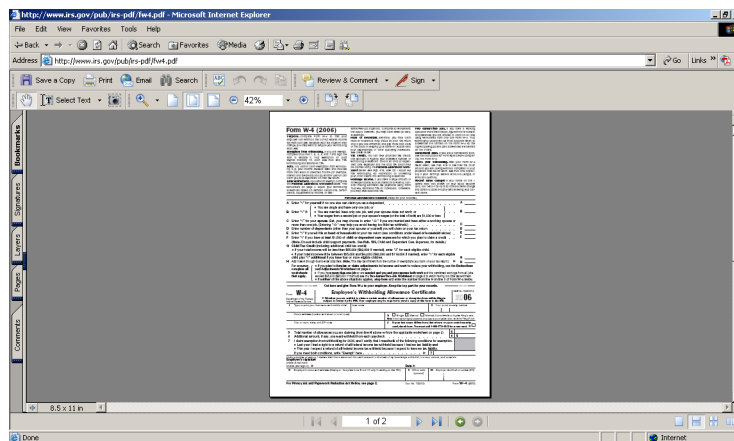
# Using the AccuRoutePDF printer

While you are working on a document in its native application, for example if you have a Microsoft Word document open in Microsoft Word, you can print the document on the AccuRoutePDF printer. The printer immediately converts your document into a PDF file, starts AccuRoute Desktop, and attaches the document to a new message.

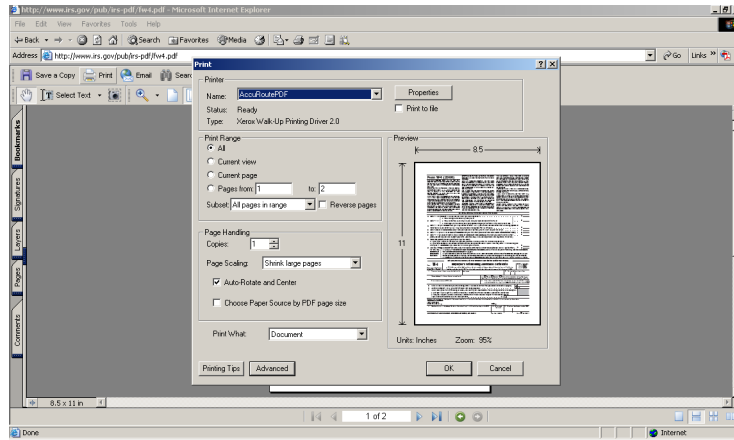
The AccuRoutePDF printer provides you with an easy way to send a message, create an Embedded Directive, or generate a Routing Sheet with the document you're working on.

## To use the AccuRoutePDF printer:

- 1 Open the document you want to send in the application that you used to create it. For example, if you want to send a message with a Microsoft Excel spreadsheet, open the spreadsheet in Microsoft Excel. If you want to send a message with an image file, open the image in any application that allows you to view or edit the image. If you want to send a message with a web page, open the web page in your browser or in an HTML editor. (The example shown here is a PDF file that is located on the Internet and displayed in the web browser.)



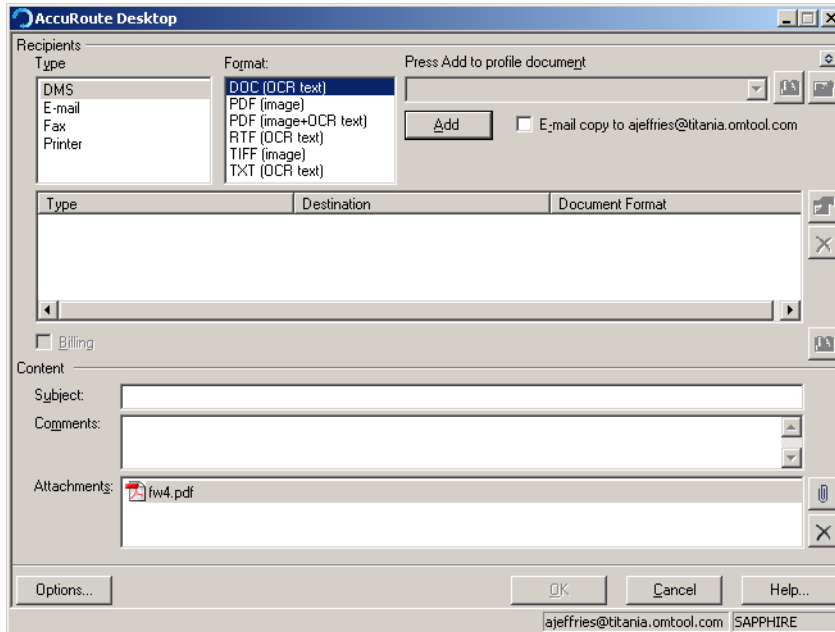
- 2 Print the file. The steps for printing the document vary among different applications, but within a standard Windows application, you should be able to click **FILE > PRINT**, or press **CTRL+P**. The **Print** dialog box should appear so that you can select the print options for your document.



**Note** The Windows Print dialog box might look different on your desktop than the example shown here.

- 3 Select the **ACCUROUTEPDF** printer, configure any other print options as desired for your message, and click **OK**. AccuRoute Desktop immediately converts the document to a PDF file. (During the file conversion, you might see the printer icon in the Windows task tray. This indicates that the document is printing in the background.)

As soon as the document has been converted to a PDF file, AccuRoute Desktop starts. (You might be prompted to log in to AccuRoute Desktop, depending on your startup configuration. If prompted, provide your login credentials and connect.) The PDF file is attached to a new message in AccuRoute Desktop. You can add more attachments to the message if desired.



Finish creating your message. Go to [Creating an AccuRoute message](#) on 2-4.

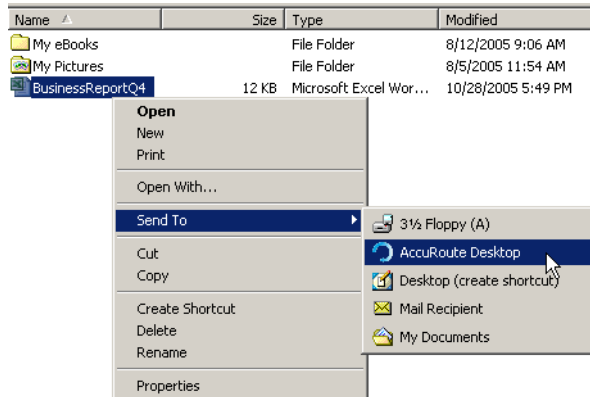


## Using the Send To AccuRoute Desktop shortcut

Anytime you are browsing the files on your computer or network, you can instantly attach a file to a new message using a Windows shortcut called Send To AccuRoute Desktop. An example of this shortcut is shown here.

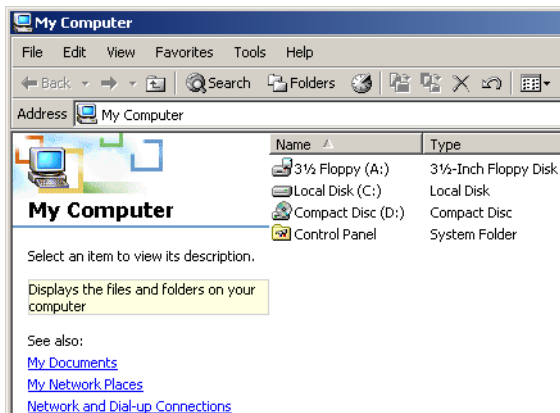
**Figure 2-B: Send To AccuRoute Desktop shortcut**

When you right-click on a document on your computer or network the Send To AccuRoute Desktop option appears in the right-click menu.

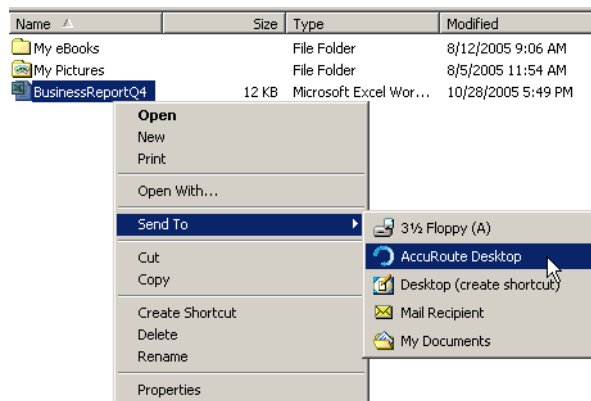


### To use the Send To AccuRoute Desktop shortcut:

- 1 Go to the file you want to send with a message. The most common methods of browsing files are My Computer and Windows Explorer. My Computer is shown here.

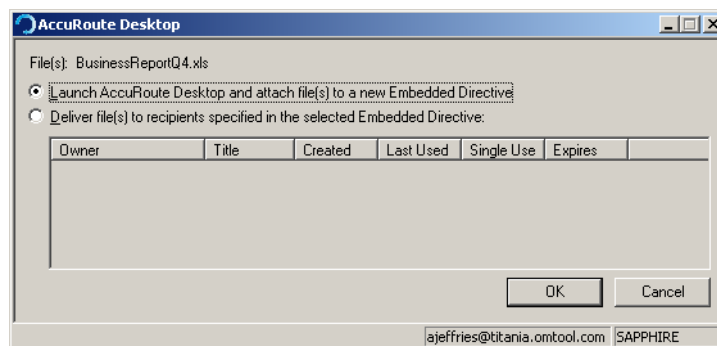


## 2 Locate the file you want to send with your message and right-click on it.



## 3 Select **SEND TO** in the shortcut menu and then select **ACCURROUTE DESKTOP**. (You might be prompted to log in to AccuRoute Desktop, depending on your startup configuration. If prompted, provide your login credentials and connect.)

AccuRoute Desktop asks you how you want to use this file. AccuRoute Desktop can attach the file to a new message, or send the file immediately using an existing Embedded Directive.



## 4 Do one of the following:

- ▶ To attach the file to a new message: Accept **LAUNCH ACCURROUTE DESKTOP AND ATTACH FILE(S) TO A NEW EMBEDDED DIRECTIVE** and click **OK**. AccuRoute Desktop immediately attaches the file to a new message. Finish creating your message. (Go to [Creating an AccuRoute message](#) on 2-4.)
- ▶ To send the file immediately using an Embedded Directive: Select an Embedded Directive and click **OK**. AccuRoute Desktop sends the AccuRoute message immediately.

# Exiting AccuRoute Desktop

**To exit AccuRoute Desktop, do any of the following:**

- ▶ Select **FILE > EXIT**.
- ▶ Close the AccuRoute Desktop window.
- ▶ Right-click the AccuRoute Desktop item in the taskbar and select **CLOSE**.
- ▶ Press **ALT+F4**.

If you have not saved your work, AccuRoute Desktop prompts you to save your work or exit the application without saving.



# Section 3: Setting preferences

This section includes:

[Understanding AccuRoute Desktop preferences](#) (3-1)

[Setting preferences](#) (3-1)

## Understanding AccuRoute Desktop preferences

Setting your preferences is the best way to save the settings that you use most often. Each time you start AccuRoute Desktop, the application uses your preferences automatically.

For example, suppose you want to receive delivery confirmation messages only when message delivery fails. In this case, you can set your preferences so that you receive delivery confirmation messages only when message delivery fails. And each time you use AccuRoute Desktop to send a new message or create a new Embedded Directive, this delivery confirmation setting is applied automatically.

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*Tip* Remember that you can update your preferences at any time. Also, you can change any setting on a per-message basis or a per-recipient basis without changing your preferences.

---

Sometimes you might want to change a setting for a special message. For example, suppose you need to send a message that is very important, and you want to receive a delivery confirmation message immediately whether the message is delivered or cannot be delivered. When you are getting ready to send the message, save the Embedded Directive, or generate a Routing Sheet, you can change the delivery confirmation setting so that you receive.

## Setting preferences

### To set preferences for AccuRoute Desktop:

- I Do one of the following:
  - ▶ Click **TOOLS > PREFERENCES**.
  - ▶ Press **CTRL+R**.

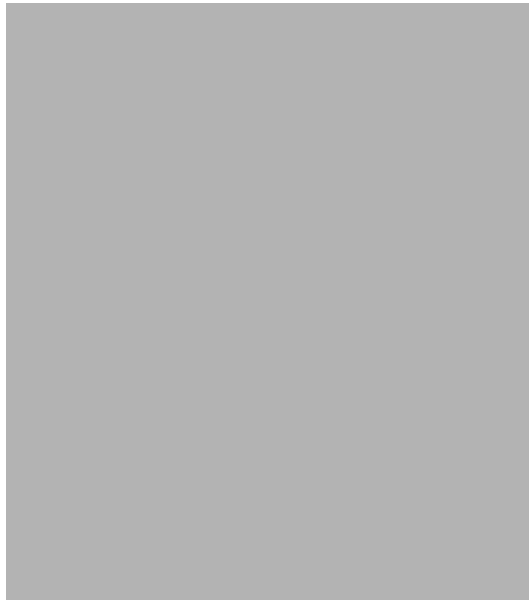
- 2 Configure the settings as desired. For more information, consult:
  - ▶ [General preferences](#) (3-2)
  - ▶ [Connection preferences](#) (3-5)
  - ▶ [Routing Sheet preferences](#) (3-6)
  - ▶ [Fax Recipient preferences](#) (3-8)
  - ▶ [E-mail Recipient preferences](#) (3-10)
  - ▶ [My AccuRoute preferences](#) (3-11)
  - ▶ [Watch Folders preferences](#) (3-12)
- 3 Click **OK** to save the settings.

## General preferences

The options on the General tab, which is part of the Preferences dialog box, are shown here.

### **Figure 3-A: Preferences dialog box showing all General preferences**

General preferences include sender information, delivery confirmation settings, and address book settings.



The following table provides guidelines on using each of these options.

**Table 3-A: Guidelines on configuring General preferences**

Feature name	Guidelines on using this feature	Additional information
Sender Information (These fields are disabled if you logged in to AccuRoute Desktop using an e-mail address.)		
Name	Enter your name, or the name that should be associated with the sender of your AccuRoute messages. (This is optional.)	The name can appear on the Routing Sheet or cover sheet if one is included with your message, and if the Routing Sheet or cover sheet has been configured to display the sender name.
E-mail	Enter your e-mail address, or the e-mail address that should be associated with the sender of your AccuRoute messages. (This is optional.)	The e-mail address can appear on the Routing Sheet or cover sheet if one is included with your message, and if the Routing Sheet or cover sheet has been configured to display the sender e-mail address.
Company	Enter your company name. (This is optional.)	The company name can appear on the Routing Sheet or cover sheet if one is included with your message, and if the Routing Sheet or cover sheet has been configured to display the sender company name.
Phone	Enter your business telephone number. (This is optional.)	The telephone number can appear on the Routing Sheet or cover sheet if one is included with your message, and if the Routing Sheet or cover sheet has been configured to display the sender telephone number.
Fax	Enter your business fax number. (This is optional.)	The fax number can appear on the Routing Sheet or cover sheet if one is included with your message, and if the Routing Sheet or cover sheet has been configured to display the sender fax number.
Confirmation (You can override these settings for an AccuRoute message using <a href="#">Selecting features for your message using Message Options (optional)</a> (2-4) or for individual recipients using <a href="#">Selecting features and setting properties for a recipient or destination (optional)</a> (2-7).)		
None	Select this option if you want it to be selected by default in the Message Options dialog box when you create new AccuRoute messages.	When None is selected as a confirmation option, you do not receive any delivery confirmation messages regarding an AccuRoute message.  You should select this option only if you are an experienced user. If you are a new user or a novice user, it is recommended that you choose a confirmation setting that allows you to get notified if message delivery fails.
Failure only	Select this option if you want it to be selected by default in the Message Options dialog box when you create new AccuRoute messages.	When Failure only is selected as a confirmation option, you receive a delivery confirmation message only if message delivery fails.  At least one printer destination or e-mail address is required for this confirmation setting. For instructions on specifying a printer or e-mail address, refer to the guidelines on using the Printer feature and the E-mail feature.
Success or failure	Select this option if you want it to be selected by default in the Message Options dialog box when you create new AccuRoute messages.	When Success or failure is selected as a confirmation option, you receive a delivery confirmation message if message delivery succeeds or fails.  At least one printer destination or e-mail address is required for this confirmation setting. For instructions on specifying a printer or e-mail address, refer to the guidelines on using the Printer feature and the E-mail feature.

**Table 3-A: Guidelines on configuring General preferences**

Feature name	Guidelines on using this feature	Additional information
Printer	Select this option if you want to specify a printer destination for the confirmation option you selected. Then click the browse button, go to a printer on the network, select the printer, and click <b>OK</b> . The printer address should appear in the Printer field.	A network printer is a shared printer that is available to users in the local area network. If you have a printer that is directly connected to your computer, you can share this printer so that you can select it as a destination for delivery confirmation messages. Ask a network administrator for more information.
E-mail	Select to specify an e-mail destination for the confirmation option you selected. Then enter an e-mail address in the E-mail field, or click the browse button and select an e-mail recipient from the address book.	The e-mail address you use to log in to AccuRoute Desktop automatically appears in this field. If you do not want to use this e-mail address as a destination for a confirmation message, simply delete it from the field and add the e-mail address you want to use.
<b>Address Book</b>		
Always expand members of distribution lists without prompting	Select this option if you do not want to be reminded that members of a distribution list are always added individually to the list of recipients and destinations.	Whenever you select a distribution list as a recipient for your message, AccuRoute Desktop adds each member of the distribution list as an individual recipient of your message.  When this option is not selected, AccuRoute Desktop displays a dialog box when you select a distribution list to remind you that members are added individually.

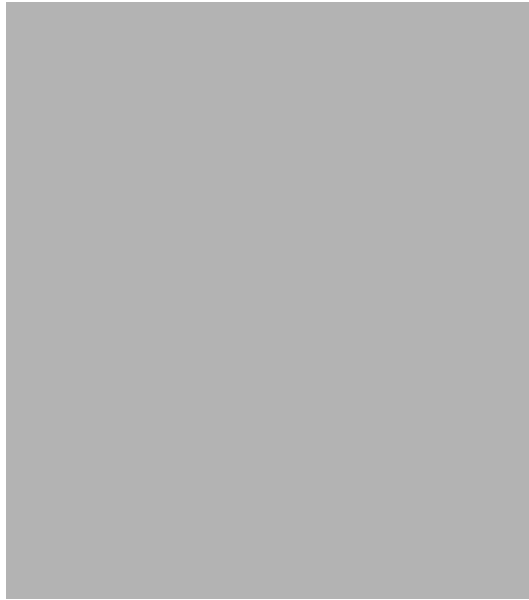


## Connection preferences

The options on the Connection tab, which is part of the Preferences dialog box, are shown here.

**Figure 3-B: Preferences dialog box showing all Connection preferences**

Connection preferences include server settings and other settings pertaining to your desktop e-mail application (if applicable).



The following table provides guidelines on using each of these options.

**Table 3-B: Guidelines on configuring Connection preferences**

Feature name	Guidelines on using this feature	Additional information
Server		
Prompt for server	Select this option if you want AccuRoute Desktop to ask you which server you want to use each time you start the application.	AccuRoute Desktop is a client application that communicates with a server application; this is similar to the way your mail program communicates with a mail server. If you do not know which server you should be using, consult a network administrator.
Always connect to	Select this option if you want AccuRoute Desktop to connect to a particular server automatically, and then enter the address of the server in the field.	AccuRoute Desktop is a client application that communicates with a server application; this is similar to the way your mail program communicates with a mail server. If you do not know which server you should be using, consult a network administrator. When this option is selected, AccuRoute Desktop does not ask you which server you want to use.

**Table 3-B: Guidelines on configuring Connection preferences**

Feature name	Guidelines on using this feature	Additional information
Outlook Logon		
Prompt for profile	Select this option if you want AccuRoute Desktop to ask you which Outlook user profile you want to use with AccuRoute Desktop.	When more than one person or Outlook user runs AccuRoute Desktop on your computer, select this option so that you can identify yourself. AccuRoute Desktop communicates with Microsoft Outlook so that you can select message recipients from its address book. This option applies to Outlook users only. If you do not use Microsoft Outlook as your mail program, this setting does not work.
Use default profile	Select this option if you want AccuRoute Desktop to start automatically using the default Outlook profile that is configured on your computer.	If you can start Microsoft Outlook without selecting your user profile, select this option. AccuRoute Desktop communicates with Microsoft Outlook so that you can select message recipients from its address book. This option applies to Outlook users only. If you do not use Microsoft Outlook as your mail program, this setting does not work.

## Routing Sheet preferences

The options on the Routing Sheet tab, which is part of the Preferences dialog box, are shown here.

**Figure 3-C: Preferences dialog box showing all Routing Sheet preferences**

Routing Sheet preferences include Embedded Directive settings, save options, and printing preferences.



The following table provides guidelines on using each of these options.

**Table 3-C: Guidelines on configuring Routing Sheet preferences**

Feature name	Guidelines on using this feature	Additional information
Embedded Directive (You can override these settings for individual messages using <a href="#">Selecting features for your message using Message Options (optional)</a> (2-4))		
Routing Sheet Style	Select the Routing Sheet style that should be selected by default in the Message Options dialog box when you create new AccuRoute messages.	The Routing Sheet style determines the way the Routing Sheet looks and the information that appears on it. The options in this menu are configured by a network administrator.
Retain Routing Sheet in delivered document	Select this option if you want it to be selected by default in the Message Options dialog box when you create new AccuRoute messages.	When a message is sent with this option enabled, the Routing Sheet is included as part of your message. When this option is disabled, the Routing Sheet is removed from your message prior to delivery.
Single use	Select this option if you want it to be selected by default in the Message Options dialog box when you create new AccuRoute messages.	When a message is sent with this option enabled, the Embedded Directive becomes invalid. If anyone tries to send another message using this Embedded Directive, the message delivery fails. An invalid Embedded Directive remains in your list of Embedded Directives for an indefinite period of time and then it is deleted automatically. While the Embedded Directive appears in your list of Embedded Directives, you can still open and edit the Embedded Directive. This means that if you want to use an Embedded Directive that has already been used once, open the Embedded Directive, clear <b>SINGLE USE</b> , and save the Embedded Directive. This makes the Embedded Directive valid again for use.
Expire after one [Day/Week/Month/Year]	Select this option if you want new Embedded Directives you create to have a default expiration date, and then select the term.	AccuRoute Desktop sets the expiration date based on the date the Embedded Directive is created. For example, if your Routing Sheet preferences indicate that new Embedded Directives should expire after one year, a new Embedded Directive is set to expire one year after it is created.
E-mail copy to [e-mail address of AccuRoute Desktop login user]	Select this option if you want the option E-mail copy to [e-mail address of AccuRoute Desktop login user] to be selected by default when you create new AccuRoute messages.	
Save Options		
Always save modified Embedded Directive without prompting	Select this option if you want AccuRoute Desktop to save changes to an Embedded Directive automatically (without prompting you).	This option determines whether AccuRoute Desktop prompts you to save recent changes to an Embedded Directive. When this option is selected, AccuRoute Desktop saves your changes automatically—without prompting you.

**Table 3-C: Guidelines on configuring Routing Sheet preferences**

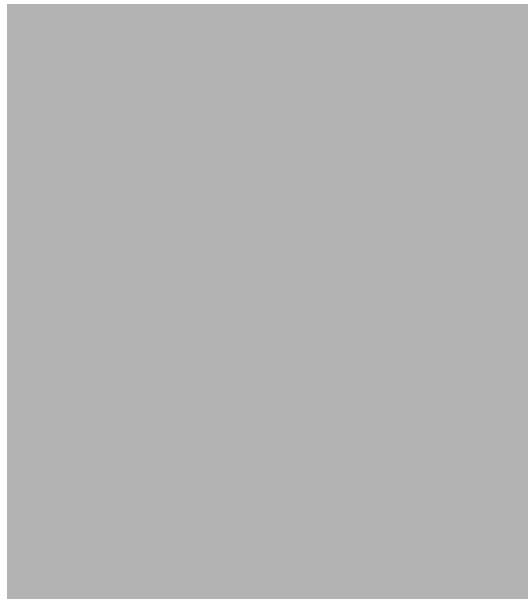
Feature name	Guidelines on using this feature	Additional information
Printing		
Print to default printer	Select this option if you want AccuRoute Desktop to print Routing Sheets on the printer that is selected as the default printer on your computer.	This option applies to the printing of Routing Sheets. When this option is selected and you print a Routing Sheet, your PDF viewing application (Adobe Acrobat or Adobe Reader) automatically prints the Routing Sheet on the default printer.
Prompt for printer to use	Select this option if you want to select the printer where you want to print Routing Sheets or select other print options for the print job.	This option applies to the printing of Routing Sheets. When this option is selected and you print a Routing Sheet, your PDF viewing application (Adobe Acrobat or Adobe Reader) prompts you to select the printer where you want to print the Routing Sheet.

## Fax Recipient preferences

The options on the Fax Recipient tab, which is part of the Preferences dialog box, are shown here.

**Figure 3-D: Preferences dialog box showing all Fax Recipient preferences**

Fax Recipient preferences include cover sheet settings, access code settings, and default settings for preview, approval, secure delivery, and delivery priority.



The following table provides guidelines on using each of these options.

**Table 3-D: Guidelines on configuring Fax Recipient preferences**

Feature name	Guidelines on using this feature	Additional information
Use cover sheet	If you want this option to be selected by default for fax recipients, select the option and then select the cover sheet style that should be selected by default for new AccuRoute messages you create.	<p><b>To add a cover sheet style:</b> Enter the name of the cover sheet style and click <b>ADD</b>.</p> <p><b>To remove a cover sheet style:</b> Select a cover sheet style and click <b>REMOVE</b>.</p> <p><b>To select the default style:</b> Select <b>USER COVER SHEET</b> and select a cover sheet style. The style you select is the default.</p>
Use access code	If you want this option to be selected by default for fax recipients, select the option and then select the access code that should be selected by default for new AccuRoute messages you create.	<p>If you are required to provide a personal access code or group access code in order to place a toll call, then you might be required to provide an access code when you send a fax. If you are not sure whether you need to specify an access code for the recipient, consult a network administrator.</p> <p><b>To add an access code:</b> Enter an access code and click <b>ADD</b>.</p> <p><b>To remove an access code:</b> Select an access code and click <b>REMOVE</b>.</p> <p><b>To select the default access code:</b> Select <b>USER ACCESS CODE</b> and select an access code. The access code you select is the default.</p>
Hold for preview before sending	Select this option if you want it to be selected by default in the Message Options dialog box when you create new AccuRoute messages.	<p>After you send a message with this option selected, you receive an e-mail message indicating that a preview of your message is available. A hyperlink allows you to see the preview, where you can send the message or cancel message delivery.</p> <p>This feature must be configured by a network administrator. If preview has not been configured for you and you select this option, message delivery fails.</p>
Requires management approval	Select this option if you want it to be selected by default in the Message Options dialog box when you create new AccuRoute messages.	<p>After you send a message with this option selected, one or more designated approval managers receives an e-mail message indicating that your message needs to be approved. As soon as an approval manager reviews the message and determines whether it is acceptable, you receive an e-mail message indicating the results of the approval process. If the approval manager did not approve your message, the e-mail message contains the approval manager's comments on why the message was not approved.</p> <p>This feature must be configured by a network administrator. If approval has been configured for you, it might be optional at your discretion or mandatory for all messages you send. If approval has not been configured for you and you select this option, message delivery fails.</p>

**Table 3-D: Guidelines on configuring Fax Recipient preferences**

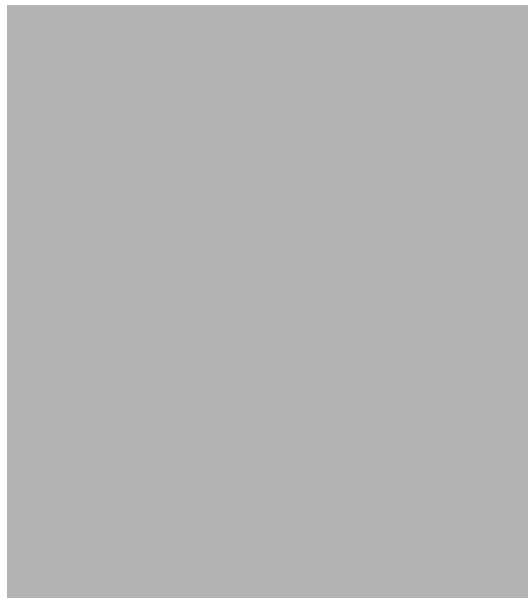
Feature name	Guidelines on using this feature	Additional information
Delivery only to secure fax destinations	Select this option if you want it to be selected by default in the Message Options dialog box when you create new AccuRoute messages.	A secure fax destination means that only the intended recipient can view the contents of your document. Secure delivery is regulated in some industries.  This feature must be configured by a network administrator. If it has not been configured and you select this option, message delivery fails.
Delivery Priority	Select the priority level that should be selected by default in the Message Options dialog box when you create new AccuRoute messages.	This setting is significant only when the overall message volume is high in your company.  This feature allows you to downgrade the priority of your message to <b>LOW</b> if you do not want it to interfere with the normal, timely delivery of other messages going to and from your company, or to upgrade the priority of a message to <b>HIGH</b> if you want the message to be delivered as soon as possible. For example, if you are sending a broadcast fax to solicit new business for your company, you might want to set the priority to <b>LOW</b> so that delivery of your fax does not interfere with the delivery of normal business correspondence.

## E-mail Recipient preferences

The options on the E-mail Recipient tab, which is part of the Preferences dialog box, are shown here.

**Figure 3-E: Preferences dialog box showing all E-mail Recipient preferences**

E-mail Recipient preferences include the file name of the attachment.



The following table provides guidelines on using each of these options.

**Table 3-E: Guidelines on configuring E-mail preferences**

Feature name	Guidelines on using this feature	Additional information
Attachment file name	If you want to specify the file name that should be used by default on new AccuRoute messages you create, enter the name in the field.	When an AccuRoute message is delivered to e-mail recipients, the recipient receives an e-mail message and your AccuRoute message is attached. This feature enables you to choose the file name of the attachment. If you do not choose a file name, it is generated automatically.

## My AccuRoute preferences

My AccuRoute is a feature that enables to you send AccuRoute messages using methods other than AccuRoute Desktop, such as a network scanner.

The options on the My AccuRoute tab, which is part of the Preferences dialog box, are shown here.

**Figure 3-F: Preferences dialog box showing all My AccuRoute preferences**

My AccuRoute preferences include the delivery method, and the Embedded Directive associated with the delivery method if applicable.



The following table provides guidelines on using each of these options.

**Table 3-F: Guidelines on configuring My AccuRoute preferences**

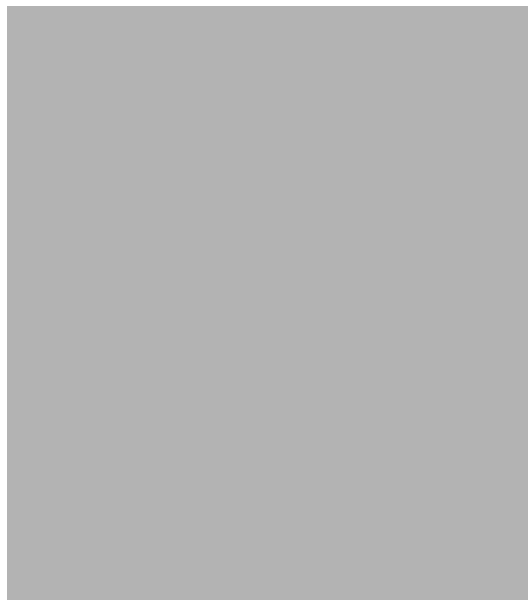
Feature name	Guidelines on using this feature	Additional information
E-mail to [e-mail address of AccuRoute Desktop login user]	Select this option if you want My AccuRoute messages to be delivered to the e-mail address you use to log in to AccuRoute Desktop.	
Deliver to recipients specified in selected Embedded Directive	Select this option if you want to choose the Embedded Directive that should be used with My AccuRoute messages and then select an Embedded Directive.	

## Watch Folders preferences

The options on the Watch Folders tab, which is part of the Preferences dialog box, are shown here.

**Figure 3-G: Preferences dialog box showing all Watch Folders preferences**

Watch Folders preferences include a list of watch folders, the status of the Watch Folders application, and startup behavior.





The following table provides guidelines on using each of these options.

*Tip* For detailed information on Watch Folders, go to [Using Watch Folders](#) (4-4).

**Table 3-G: Guidelines on configuring Watch Folders preferences**

Feature name	Guidelines on using this feature	Additional information
Folders		
Folder list	The folders have two properties: the folder location and the title of the Embedded Directive that is associated with the folder.	<p><b>To add a folder:</b> Click <b>ADD</b>. The <b>Add new watch folder</b> dialog box appears. Click the browse button, go to the watch folder, select it, and click <b>OK</b>. Then select the Embedded Directive that you want to associate with the folder and click <b>OK</b>.</p> <p><b>To set advanced options for a folder:</b> Select a watch folder and click <b>PROPERTIES</b>. Click <b>ADVANCED</b>. The <b>Watch Folder Advanced Options</b> dialog box appears. Select <b>STORE PROCESSED FILE IN FOLDER</b> if you want the Watch Folders application to move files to a different folder after they have been processed, and then go to the folder where you want the processed files to be moved. (If this option is not selected, the Watch Folders application processes the files and then deletes them.) Make sure that the Extensions to process list includes all the types of files that you send. Add or remove file types if necessary. Then click <b>OK</b>.</p> <p><b>To remove a folder:</b> Select a folder and click <b>REMOVE</b>. Click <b>YES</b> on the confirmation dialog box.</p> <p><b>To view the properties of a folder:</b> Select a folder and click <b>PROPERTIES</b>. Modify the folder properties as desired and then click <b>OK</b>.</p>
Watch Folders Application		
Enable Disable	Select <b>ENABLE</b> to run the Watch Folders application.  Select <b>DISABLE</b> to stop the Watch Folders application.	When the application is enabled, it is running. When the application is disabled, it is not running.
Start Watch Folders tray application at Windows startup	Select this option to start the Watch folders tray application when you start your computer.	<p>When this option is selected, a special icon appears in the system tray when you start your computer. When you right-click on the icon, you can easily access options for the application. (The system tray is located in the bottom right corner of your screen near the date and time.)</p> <p><b>Note: The application can run even when the icon does not appear in the system tray. Whenever the application is enabled, it is running. Whenever the application is disabled, it is not running.</b></p>



# Section 4: Using advanced features

This section includes:

[Using templates to create Embedded Directives and Routing Sheets](#) (4-1)

[Sending messages using My AccuRoute](#) (4-3)

[Using Watch Folders](#) (4-4)

[Managing Configuration Folders](#) (4-14)

## Using templates to create Embedded Directives and Routing Sheets

AccuRoute Desktop provides you with a convenient method of saving all the current settings, including your message recipients and destination, subject, comments, attachments, etc., as a template.

By using a template with the most common settings you use to send messages and create Embedded Directives, you save yourself time and ensure that you won't forget anything important, such as your company's confidentiality notice if it is required to be part of the messages and Embedded Directives you send.

[Saving a template](#) (4-2)

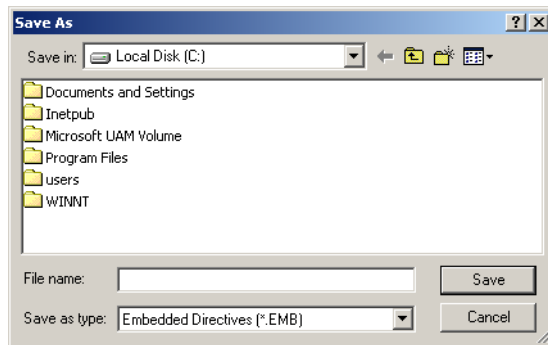
[Opening a template](#) (4-2)

## Saving a template

### To save a template:

- 1 Start a new message in AccuRoute Desktop and add the settings that you want to save with the template. The message must have at least one recipient or destination.
- 2 Do one of the following:
  - ▶ To save the settings: Click **FILE > TEMPLATES > SAVE**.
  - ▶ To save the settings from an existing template as a new template: Click **FILE > TEMPLATES > SAVE AS NEW**.

The **Save As** dialog box appears.



- 3 Go to the folder where you want to save the template.
- 4 Enter a name for the template in the **File name** field.
- 5 Click **SAVE**.

## Opening a template

### To open a template:

- 1 Start AccuRoute Desktop.
- 2 Click **FILE > TEMPLATES > OPEN**.
- 3 Go to the folder where the template file is located and select the template. (Template files have the EMB file extension.)
- 4 Click **OPEN**. AccuRoute Desktop loads the settings from the template.

# Sending messages using My AccuRoute

My AccuRoute is an advanced feature of AccuRoute Desktop. It requires configuration on your computer, as well as additional configuration that must be completed by a network administrator.

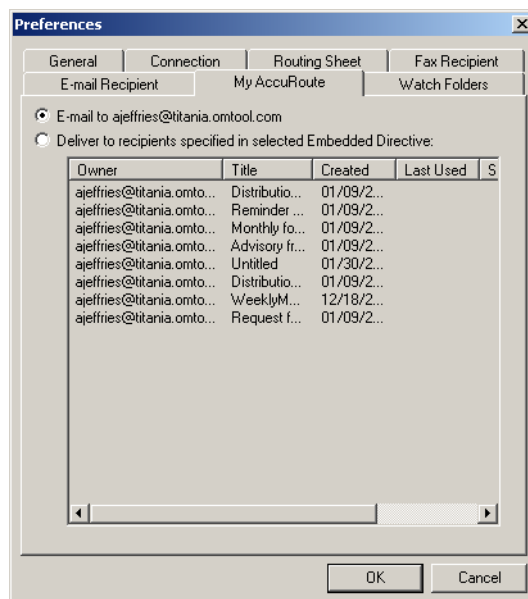
Configure My AccuRoute using the following procedure. Also, verify with your network administrator that this feature has been set up for your use.

## To configure My AccuRoute:

- 1 Do one of the following:
  - ▶ Click **TOOLS > PREFERENCES**.
  - ▶ Press **CTRL+R**.

The **Preferences** dialog box appears.

- 2 Go to the **My AccuRoute** tab.



- 3 Do one of the following:
  - ▶ Select **E-MAIL TO [E-MAIL ADDRESS OF ACCURROUTE DESKTOP LOGIN USER]** if you want the messages you send with a Routing Sheet to be delivered to the sender's e-mail address.
  - ▶ Select **DELIVER TO RECIPIENTS SPECIFIED IN THE SELECTED EMBEDDED DIRECTIVE** if you want the messages you send with a Routing Sheet to be distributed using an Embedded Directive, and then select an Embedded Directive.
- 4 Click **OK** to save the settings.

# Using Watch Folders

Watch Folders is an application that runs on your computer. The premise of the application is a folder, called a watch folder, that is associated with an Embedded Directive. When you want to send one or more files as an AccuRoute message, you can copy those files to the Watch Folder and AccuRoute Desktop sends the files automatically using the Embedded Directive that is associated with the folder. Think of a Watch Folder as an automatic sending queue. When you drop files into the folder, AccuRoute Desktop sends them automatically.

The Watch Folders application supports multiple watch folders, so you can create as many watch folders as you need.

[Setting up the Watch Folders application](#) (4-4)

[Handling used files](#) (4-8)

[Setting the types of files that a folder can process](#) (4-10)

[Starting and exiting the Watch Folders application](#) (4-12)

## Setting up the Watch Folders application

To use the Watch Folders application, you must:

- create the Embedded Directive you want to associate with the watch folder;
- create the folder that you want to use as a watch folder on your computer;
- configure the Watch Folders application with the folder you created; and
- enable the Watch Folders application.

These steps are covered in the following procedure.

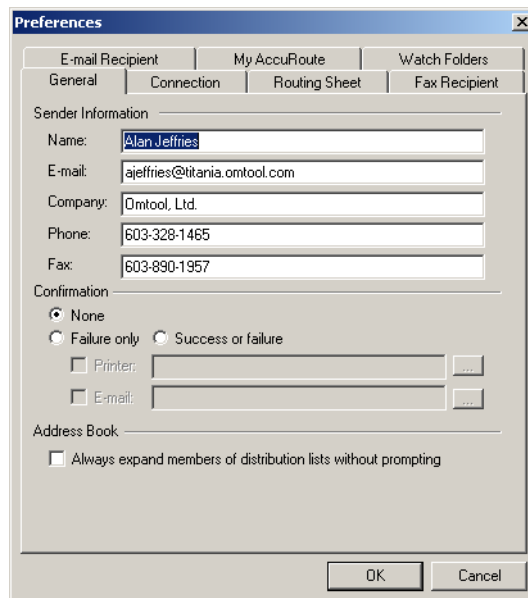
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**Note** This feature requires special configuration that must be completed by a network administrator. Check with your network administrator before you configure this feature on your desktop.

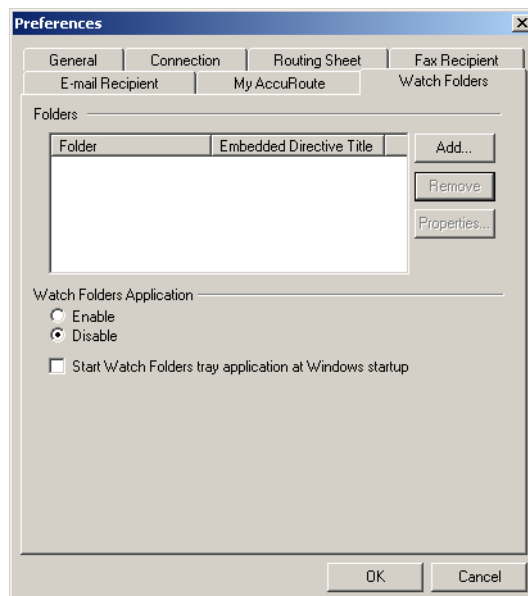
---

**To use the Watch Folders application:**

- 1 Create the Embedded Directive you want to associate with the watch folder. (Go to [Saving an AccuRoute message as an Embedded Directive](#) on 2-12.) If the Embedded Directive already exists, go to the next step.
- 2 Create a folder on your computer. This is the folder that you want to use as a watch folder. Choose a descriptive name that can help you remember when you should use the watch folder, for example, AccuRouteWatchFolder\_Invoices.
- 3 Configure the Watch Folders application with the watch folder:
  - a Click **TOOLS > PREFERENCES**. The **Preferences** dialog box appears.

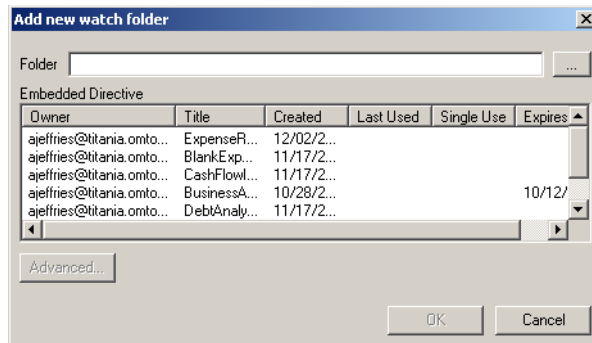


- b Go to the **Watch Folders** tab.

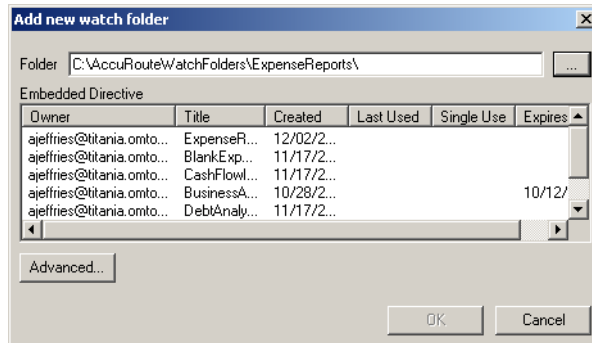


## Section 4: Using advanced features

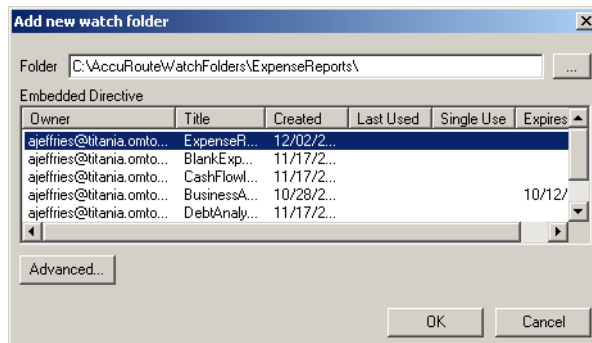
- c Go to the **Folders** section and click **ADD**.



- d Choose the folder you want to use as a watch folder using one of the following methods:
- ▶ Click the browse button **...** next to the folder field and go to the folder that you want to add as a watch folder. Then go to the folder you want to use as a watch folder, select the folder, and click **OK**. (This adds the folder location to the **Folder** field.)
  - ▶ Enter the path to the folder in the **Folder** field. This is recommended only if you know the exact path to the folder.

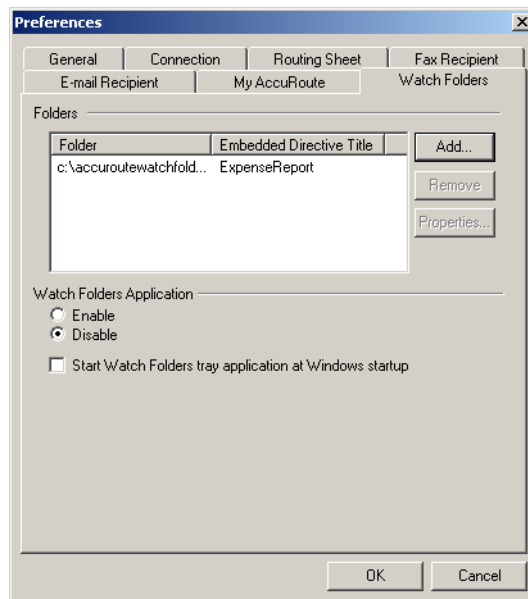


- e Select the Embedded Directive that you want to associate with this folder.



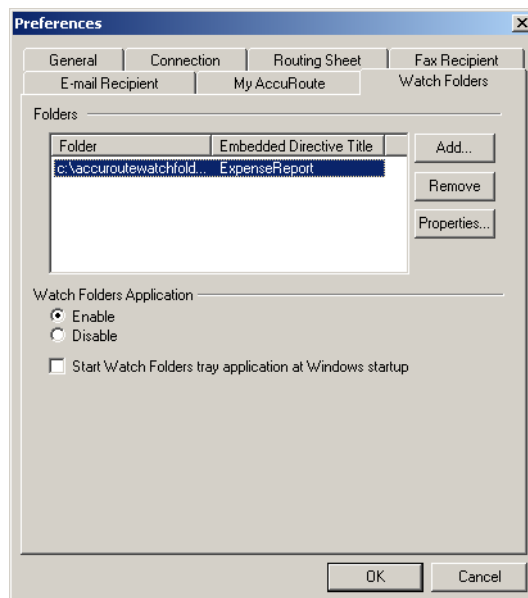


- f Click **OK** to add the watch folder to the Watch Folders configuration.

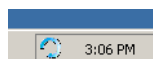


- g Repeat this series of steps to add another watch folder to the Watch Folders configuration.

- 4 Enable the Watch Folders application. Go to the **Watch Folders Application** section and select **ENABLE**.



- 5 Select **START WATCH FOLDERS TRAY APPLICATION AT WINDOWS STARTUP** if you want the Watch folders application to start automatically each time you log in to Windows.
- 6 Click **OK** to save your changes to the Watch Folders configuration. The Watch Folders tray icon appears in the Windows task tray.



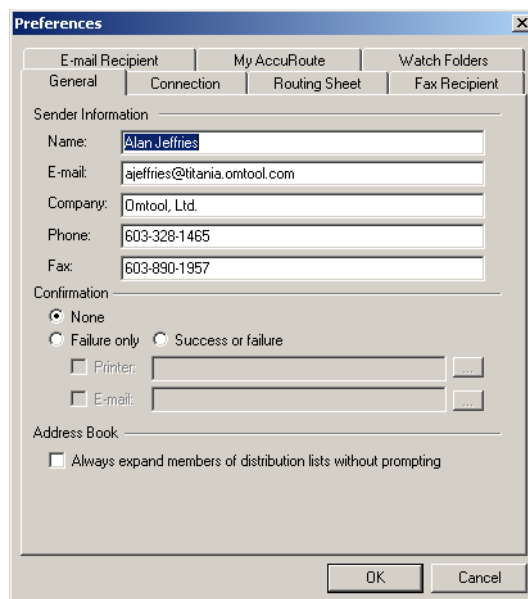
## Handling used files

As soon as the Watch Folders application processes the files in a watch folder, it must do something with the used files so that they do not remain in the watch folder. You can set up a watch folder to do either of the following:

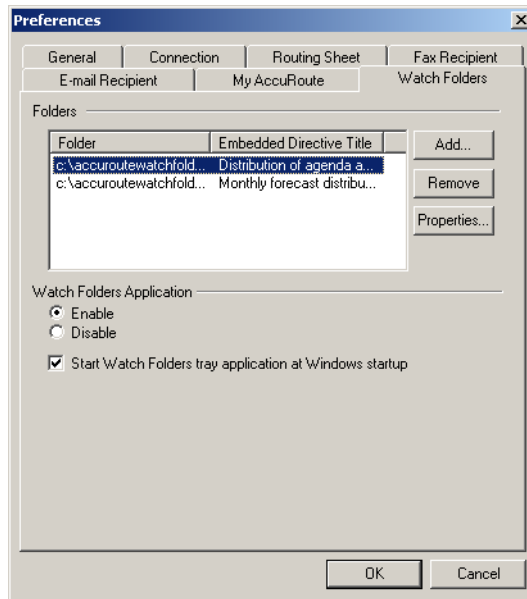
- Delete the used files. This is the normal behavior and does not require any configuration.
- Move the used files to a different folder. This requires configuration. Complete the procedure that follows.

### To set up a watch folder so that it moves used files to a different folder:

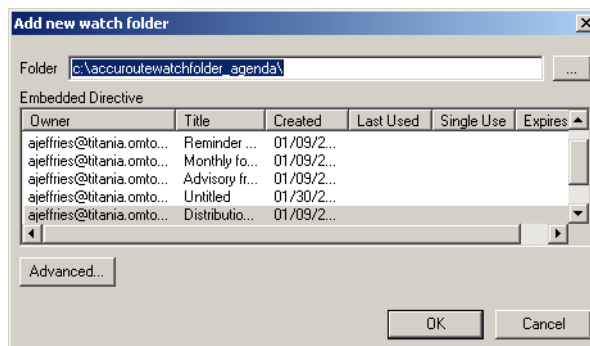
- I Click **TOOLS > PREFERENCES**. The **Preferences** dialog box appears.



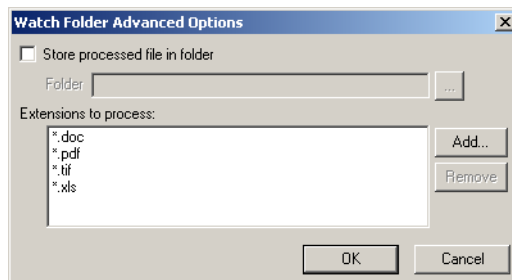
**2** Go to the **Watch Folders** tab.



**3** Select the watch folder that should move used files to a different folder and click **PROPERTIES**. The **Add a new watch folder** dialog box appears.



**4** Click **ADVANCED**. The **Watch Folder Advanced Options** dialog box appears.



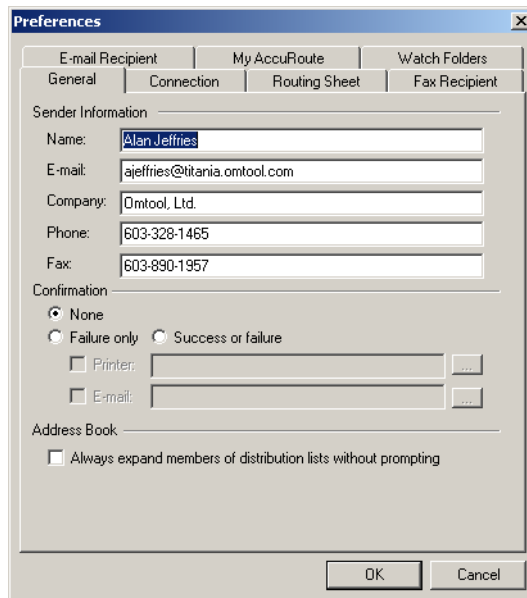
- 5 Select **STORE PROCESSED FILE IN FOLDER**. The **Folder** field automatically chooses a location for you—a folder called “Processed” that is in the watch folder. It is recommended that you use this folder so that you can easily associate the Processed folder with the watch folder, but you can change the folder location if desired.
- 6 Click **OK** to close the **Watch Folder Advanced Options** dialog box.
- 7 Click **OK** to close the **Add a new watch folder** dialog box.
- 8 Click **OK** to save your changes and close the **Preferences** dialog box.

## Setting the types of files that a folder can process

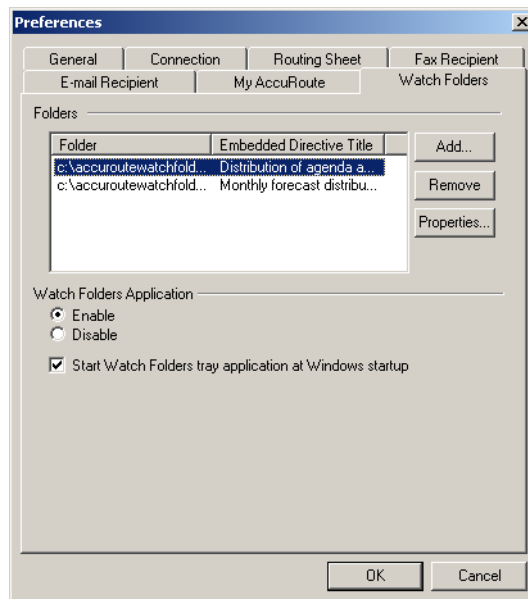
You can set the list of file types that a watch folder can process. For example, if you want to be able to copy JPG files to the watch folder, you can add the file type JPG as a supported file type for the watch folder.

### To set the list of file types that a watch folder can process:

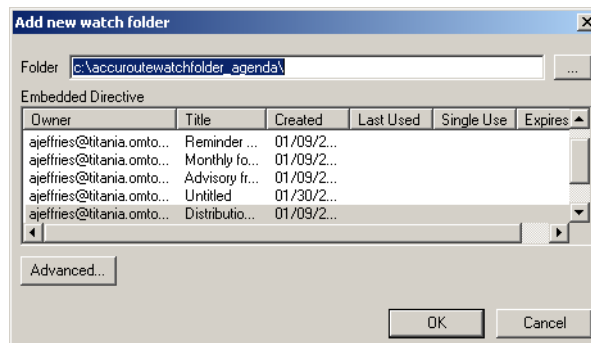
- I Click **TOOLS > PREFERENCES**. The **Preferences** dialog box appears.



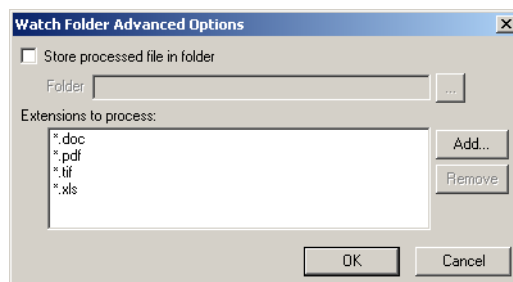
**2** Go to the **Watch Folders** tab.



**3** Select a watch folder and click **PROPERTIES**. The **Add a new watch folder** dialog box appears.



**4** Click **ADVANCED**. The **Watch Folder Advanced Options** dialog box appears.



**5** Add or remove file types as desired:

- ▶ **To add a file type:** Click **ADD**. Enter the file extension in the same format as the example provided (for example, \*.JPG) and click **OK**.
- ▶ **To remove a file type:** Select a file type and click **REMOVE**.

- 6 Click **OK** to close the **Watch Folder Advanced Options** dialog box.
- 7 Click **OK** to close the **Add a new watch folder** dialog box.
- 8 Click **OK** to save your changes and close the **Preferences** dialog box.

## Starting and exiting the Watch Folders application

[Enabling the Watch Folders application](#) (4-12)

[Configuring the Watch Folders application to start automatically with Windows](#) (4-12)

[Disabling the Watch Folders application](#) (4-13)

### Enabling the Watch Folders application

**To start or restart the Watch Folders application:**

- 1 Start AccuRoute Desktop.
- 2 Click **TOOLS > PREFERENCES**. The **Preferences** dialog box appears.
- 3 Go to the **Watch Folders** tab.
- 4 Go to the **Watch Folders Application** section and select **ENABLE**.
- 5 Click **OK**.

### Configuring the Watch Folders application to start automatically with Windows

**To configure the Watch Folders application to start automatically with Windows:**

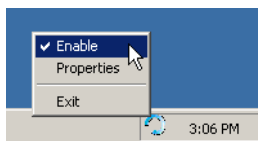
- 1 Start AccuRoute Desktop.
- 2 Click **TOOLS > PREFERENCES**. The **Preferences** dialog box appears.
- 3 Go to the **Watch Folders** tab.
- 4 Select **START WATCH FOLDERS TRAY APPLICATION AT WINDOWS STARTUP**.
- 5 Click **OK**.

## Disabling the Watch Folders application

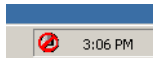
Complete the following procedure to disable the Watch Folders application. When you disable the Watch Folders application, the application stops running but the Watch Folders tray icon still appears in the Windows task tray so that you can restart the application easily.

### To disable the Watch Folders application:

- 1 Locate the Watch Folders tray icon in the Windows task tray. (If you do not see the Watch Folders tray icon in the Windows task tray, the application is not running. It can only be disabled when it is running.)
- 2 Right-click on the icon and select **ENABLE**.



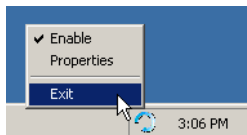
The Watch Folders tray icon remains in the Windows task tray, but changes to indicate that the application is disabled.



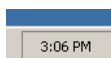
## Exiting the Watch Folders application

### To exit the Watch Folders application:

- 1 Locate the Watch Folders tray icon in the Windows task tray.
- 2 Right-click on the icon and select **EXIT**.



The Watch Folders tray icon disappears from the Windows task tray.



# Managing Configuration Folders

A configuration folder is a folder on your computer where AccuRoute Desktop configuration files are located. A configuration file can be a Routing Sheet style template or a view file.

Depending on how AccuRoute Desktop has been configured, you might be able to add, remove, and edit the properties of configuration files:

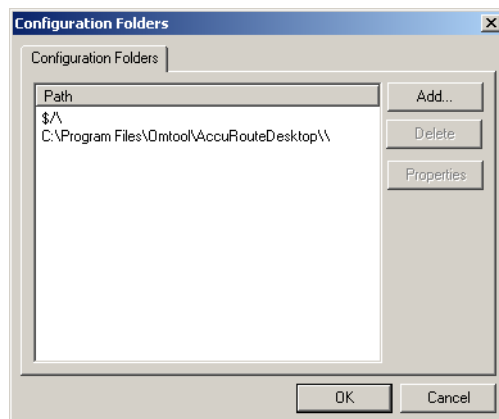
- [Adding a configuration folder](#) (4-14)
- [Removing a configuration folder](#) (4-15)
- [Viewing the properties of a configuration folder](#) (4-16)

Modify configuration folders only when instructed by a network administrator.

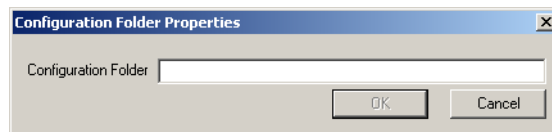
## Adding a configuration folder

**To add a configuration folder:**

- 1 Click **TOOLS > CONFIGURATION FOLDERS**. The **Configuration Folders** window appears.

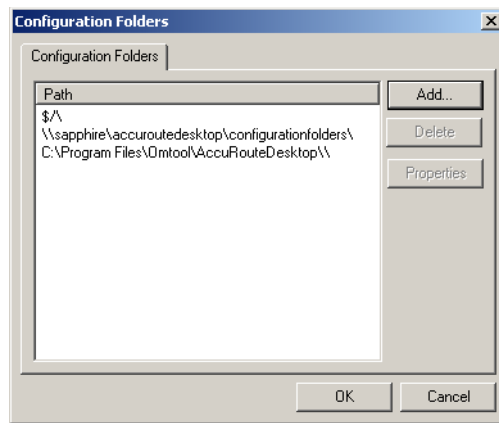


- 2 Click **ADD**. The **Configuration Folder Properties** dialog box appears.





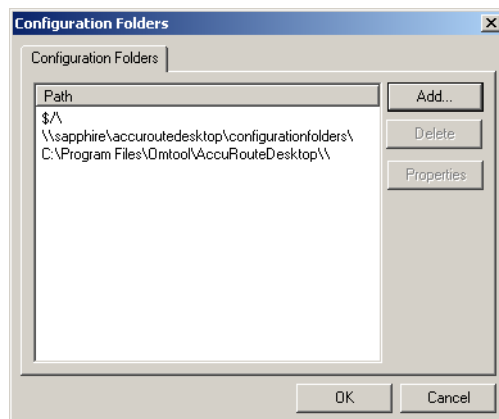
- 3 Enter the location of the folder. Use one of the following formats:
  - ▶ **Local path to the folder.** The local path includes a drive letter. For example:  
C:\AccuRouteDesktop\MyConfigurationFolders or  
C:\AccuRouteDesktop\MyConfigurationFolders\.
  - ▶ **Universal path to the folder.** The universal path, also called the “UNC path”, does not include a drive letter. Instead it includes the computer name or IP address of the computer where the folder is located. The following examples demonstrate a path to a folder on the computer called “sapphire”. For example: \\SAPPHIRE\AccuRouteDesktop\ConfigurationFolders or  
\\SAPPHIRE\AccuRouteDesktop\ConfigurationFolders\.
- 4 Click **OK**. The configuration folder appears in the list.



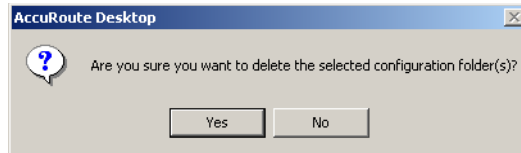
## Removing a configuration folder

**To remove a configuration folder:**

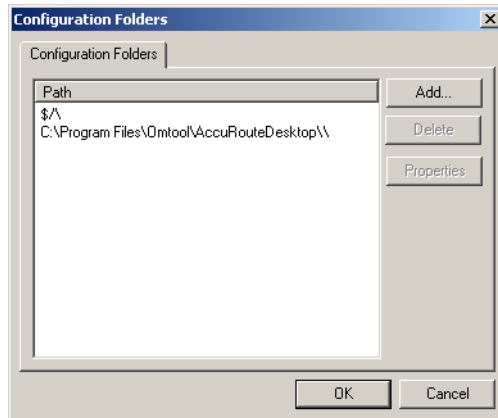
- I Click **TOOLS > CONFIGURATION FOLDERS**. The **Configuration Folders** window appears.



- 2 Select the configuration folder you want to remove and click **DELETE**. A confirmation dialog box appears.



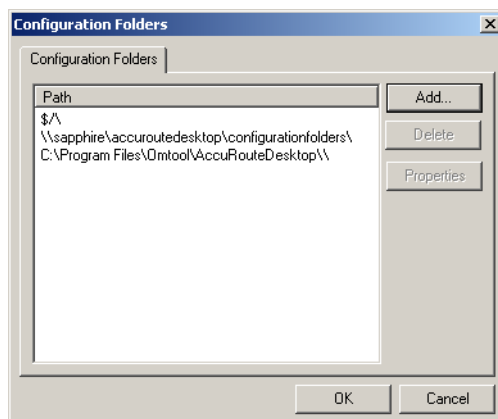
- 3 Click **YES**. The folder is removed.



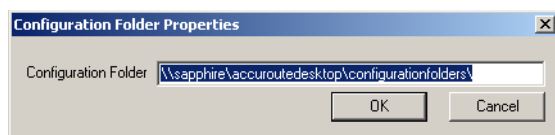
## Viewing the properties of a configuration folder

**To view the properties of a configuration folder:**

- I Click **TOOLS > CONFIGURATION FOLDERS**. The **Configuration Folders** window appears.



- 2 Select a configuration folder and click **PROPERTIES**. The **Configuration Folder Properties** dialog box displays the path to the configuration folder.



- 3 Edit the location if necessary and click **OK** to save your changes.



# Appendix: Message Options

This section contains a list of the features you can select in the Message Options dialog box, and some additional guidelines on using those features:

[General tab \(A-1\)](#)

[Fax tab \(A-3\)](#)

[E-mail tab \(A-5\)](#)

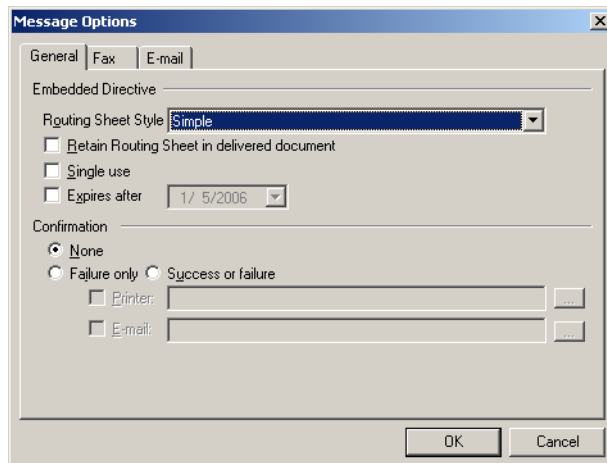
For general instructions on configuring Message Options, go to [Selecting features for your message using Message Options \(optional\) \(2-4\)](#).

## General tab

The options on the General tab, which is part of the Message Options dialog box, are shown here.

**Figure A-1: Message Options dialog box showing General preferences**

General message options include Embedded Directive options and delivery confirmation settings.



The following table provides guidelines on using each of these options.

**Table A-1: Features available on the General tab of the Message Options dialog box**

Feature name	Guidelines on using this feature	Additional information
Embedded Directive options		
Routing Sheet Style	Select a Routing Sheet style.	The Routing Sheet style determines the way the Routing Sheet looks and the information that appears on it. The options are configured by a network administrator.

**Table A-1: Features available on the General tab of the Message Options dialog box**

Feature name	Guidelines on using this feature	Additional information
Retain Routing Sheet in delivered document	Select this option if you want the Routing Sheet to be included as part of your AccuRoute message.	If you do not select this option, the Routing Sheet is removed from your message prior to delivery.
Single use	Select this option if you want the Embedded Directive to be valid only for the first use.	<p>When this option is selected and the Embedded Directive has already been used once, the Embedded Directive becomes invalid. If anyone tries to send another message using this Embedded Directive, the message delivery fails.</p> <p>An invalid Embedded Directive remains in your list of Embedded Directives for an indefinite period of time and then it is deleted automatically. While the Embedded Directive appears in your list of Embedded Directives, you can still open and edit the Embedded Directive. This means that if you want to use an Embedded Directive that has already been used once, open the Embedded Directive, clear the Single Use option, and save the Embedded Directive. This makes the Embedded Directive valid again for use.</p>
Expires after	Select this option if you want to set an expiration date on the Embedded Directive.	<p>When an Embedded Directive expires, it becomes invalid. If anyone tries to send a message using an expired Embedded Directive, the message delivery fails.</p> <p>An invalid Embedded Directive remains in your list of Embedded Directives for an indefinite period of time and then it is deleted automatically. While the Embedded Directive appears in your list of Embedded Directives, you can still open and edit the Embedded Directive. This means that if you want to use an Embedded Directive that has expired, open the Embedded Directive, change the expiration date, and save the Embedded Directive. This makes the Embedded Directive valid again.</p>
<b>Confirmation options</b>		
None	Select this option if you do not want to receive any delivery confirmation messages for this AccuRoute message.	You should select this option only if you are an experienced user. If you are a new user or a novice user, it is recommended that you choose a confirmation setting that allows you to get notified if the message delivery fails.
Failure only	Select this option if you want to receive a delivery confirmation message only if message delivery fails. Then choose any combination of printer destinations and e-mail addresses as the destination for the confirmation message.	At least one printer destination or e-mail address is required for this confirmation setting. For instructions on specifying a printer or e-mail address, refer to the guidelines on using the Printer feature and the E-mail feature.
Success or failure	Select this option if you want to receive a delivery confirmation message when the delivery attempt is complete. Then choose any combination of printer destinations and e-mail addresses as the destination for the confirmation message.	<p>When this option is selected, you receive a delivery confirmation message if message delivery succeeds or fails.</p> <p>At least one printer destination or e-mail address is required for this confirmation setting. For instructions on specifying a printer or e-mail address, refer to the guidelines on using the Printer feature and the E-mail feature.</p>

**Table A-1: Features available on the General tab of the Message Options dialog box**

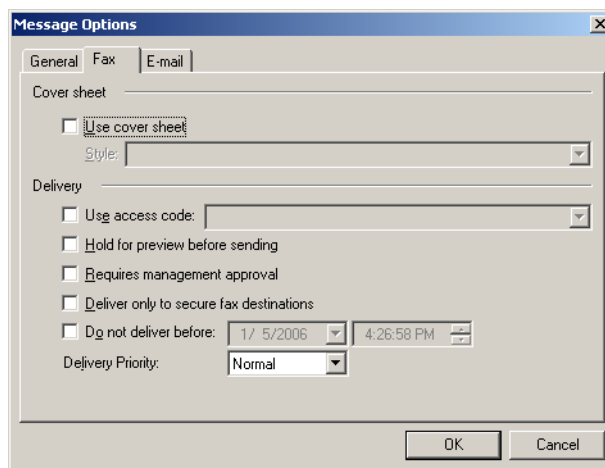
Feature name	Guidelines on using this feature	Additional information
Printer	Select this option if you want the delivery confirmation message to be delivered to a network printer. Then click the browse button, go to a printer on the network, select the printer, and click <b>OK</b> . The printer address should appear in the Printer field.	A network printer is a shared printer that is available to users in the local area network. If you have a printer that is directly connected to your computer, you can share this printer so that you can select it as a destination for delivery confirmation messages. Ask a network administrator for more information.
E-mail	Select this option if you want the delivery confirmation message to be delivered to an e-mail address. Then enter an e-mail address in the E-mail field, or click the browse button and select an e-mail recipient from the address book.	The e-mail address you use to log in to AccuRoute Desktop automatically appears in this field. If you do not want to use this e-mail address as a destination for a confirmation message, simply delete it from the field and add the e-mail address you want to use.

## Fax tab

The options on the Fax tab, which is part of the Message Options dialog box, are shown here.

**Figure A-2: Message Options dialog box showing Fax preferences**

Fax message options include cover sheet settings and delivery options.



The following table provides guidelines on using each of these options.

**Table A-2: Features available on the Fax tab of the Message Options dialog box**

Feature name	Guidelines on using this feature	Additional information
Cover sheet options		
Use cover sheet	Select this option if you want to include a cover sheet when the message is delivered to fax recipients. Then select a cover sheet style.	The cover sheet style determines the way the cover sheet looks and the information that appears on it.
Delivery options		
Use access code	Select this option if you want to include an access code that should be used to deliver the message to fax recipients. Then enter or select an access code.	If you are required to provide a personal access code or group access code in order to place a toll call, then you might be required to provide an access code when you send a fax. If you are not sure whether you need to specify an access code for the recipient, consult a network administrator.
Hold for preview before sending	Select this option if you want to preview the message before it is delivered to fax recipients.	After you send a message with this option selected, you receive an e-mail message indicating that a preview of your message is available. A hyperlink allows you to see the preview, where you can send the message or cancel message delivery.  This feature must be configured by a network administrator. If preview has not been configured for you and you select this option, message delivery fails.
Requires management approval	Select this option if you want this message to be approved by a designated approval manager before it is delivered to fax recipients.	After you send a message with this option selected, one or more designated approval managers receives an e-mail message indicating that your message needs to be approved. As soon as an approval manager reviews the message and determines whether it is acceptable, you receive an e-mail message indicating the results of the approval process. If the approval manager did not approve your message, the e-mail message contains the approval manager's comments on why the message was not approved.  This feature must be configured by a network administrator. If approval has been configured for you, it might be optional at your discretion or mandatory for all messages you send. If approval has not been configured for you and you select this option, message delivery fails.
Deliver only to secure fax destinations	Select this option if you want this message to be delivered to fax destinations only when the fax destination is secure.	A secure fax destination means that only the intended recipient can view the contents of your document. Secure delivery is regulated in some industries.  This feature must be configured by a network administrator. If it has not been configured and you select this option, message delivery fails.



**Table A-2: Features available on the Fax tab of the Message Options dialog box**

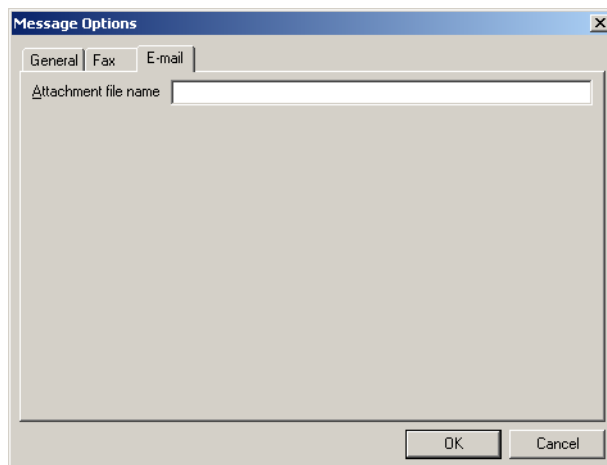
Feature name	Guidelines on using this feature	Additional information
Do not delivery before [date and time]	Select this option if you want to specify the date and time when the message is delivered. Then set the date and time for delivery using the date menu and the time field.	This feature enables you to schedule message delivery in advance.
Delivery Priority	Select a delivery priority for your message.	<p>This setting is significant only when the overall message volume is high in your company.</p> <p>This feature allows you to downgrade the priority of your message to <b>Low</b> if you do not want it to interfere with the normal, timely delivery of other messages going to and from your company, or to upgrade the priority of a message to <b>High</b> if you want the message to be delivered as soon as possible. For example, if you are sending a broadcast fax to solicit new business for your company, you might want to set the priority to <b>Low</b> so that delivery of your fax does not interfere with the delivery of normal business correspondence.</p>

## E-mail tab

The options on the E-mail tab, which is part of the Message Options dialog box, are shown here.

**Figure A-3: Message Options dialog box showing E-mail preferences**

E-mail message options include the file name of the attachment.



The following table provides guidelines on using each of these options.

**Table A-3: Features available on the E-mail tab of the Message Options dialog box**

Feature name	Guidelines on using this feature	Additional information
Attachment file name	Choose a file name for your AccuRoute message and enter it in the field.	When an AccuRoute message is delivered to e-mail recipients, the recipient receives an e-mail message and your AccuRoute message is attached. This feature enables you to choose the file name of the attachment. If you do not choose a file name, it is generated automatically.

# Appendix: Features for recipients and destinations

Appendix B contains a list of the properties and features related to recipients and destinations, and some additional guidelines on using those features:

- [Properties of e-mail recipients](#) (B-1)
- [Properties of fax recipients](#) (B-4)
- [Properties of printer destinations](#) (B-7)
- [Properties of DMS destinations](#) (B-9)

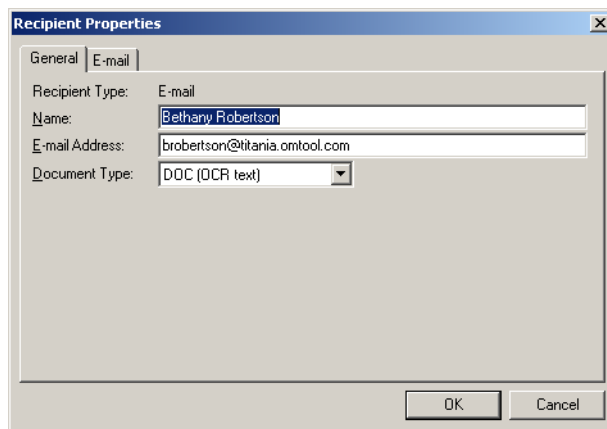
## Properties of e-mail recipients

### E-mail recipient > General properties

The general properties of an e-mail recipient are shown here.

**Figure B-1: Recipient Properties dialog box showing General properties of an e-mail recipient**

General e-mail recipient properties include the recipient type, recipient name, e-mail address, and document delivery format.



The following table provides guidelines on using each of these options.

**Table B-1: General properties of an e-mail recipient**

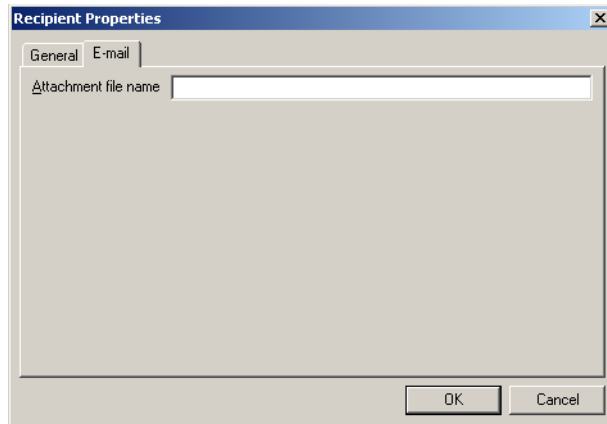
Feature name	Guidelines on using this feature	Additional information
Recipient Type	Not applicable.	AccuRoute Desktop automatically populates this information. It represents the recipient type that you selected when you added the recipient.
Name	Enter the name of the recipient. (This is optional.)	<p>When you select a recipient from the address book associated with your mail program, AccuRoute Desktop uses the name associated with the contact record.</p> <p>The name can appear on the Routing Sheet or cover sheet if one is included with your message, and if the Routing Sheet or cover sheet has been configured to display the recipient's name.</p>
E-mail Address	Verify that the e-mail address is correct. (This is required.)	This is the official destination address used to deliver the message to the recipient.
Document Type	Select a file format for the message that is delivered to this recipient. (This is required.)	<p>When you send an AccuRoute message to an e-mail recipient, the recipient receives an e-mail message and your AccuRoute message is attached. The document type determines the file type that this recipient receives. For example, if you choose PDF (image), the recipient receives your AccuRoute message as a PDF file. This property is required.</p> <p>The available formats are configured by a network administrator. The most common ones include:</p> <ul style="list-style-type: none"> <li>• <b>DOC (OCR text)</b> - Produces a Microsoft Word document that contains the text from your original message.</li> <li>• <b>PDF (image)</b> - Produces a PDF file.</li> <li>• <b>PDF (image+OCR text)</b> - Produces a PDF file that is searchable.</li> <li>• <b>RTF (OCR text)</b> - Produces a Rich Text Format document that contains the text from your original message.</li> <li>• <b>TIFF (image)</b> - Produces a single TIFF file that contains as many pages as your original message.</li> <li>• <b>TXT (OCR text)</b> - Produces a simple text document that contains the text from your original message.</li> </ul> <p>Consult your network administrator if you have questions on the format of your message.</p>

## E-mail recipient > E-mail properties

The e-mail properties of an e-mail recipient are shown here.

**Figure B-2: Recipient Properties dialog box showing E-mail properties of an e-mail recipient**

E-mail recipient properties include the file name of the attachment.



The following table provides guidelines on using each of these options.

**Table B-2: E-mail properties of an e-mail recipient**

Feature name	Guidelines on using this feature	Additional information
Attachment file name	Choose a file name for your AccuRoute message and enter it in the field.	When an AccuRoute message is delivered to e-mail recipients, the recipient receives an e-mail message and your AccuRoute message is attached. This feature enables you to choose the file name of the attachment. If you do not choose a file name, it is generated automatically.

# Properties of fax recipients

## Fax recipient > General properties

The general properties of a fax recipient are shown here.

**Figure B-3: Recipient Properties dialog box showing General properties of a fax recipient**

General fax recipient properties include the recipient type, recipient name, fax number, company name, business phone number, e-mail address, and document delivery format.

The screenshot shows a dialog box titled "Recipient Properties" with two tabs: "General" and "Fax". The "General" tab is active. The fields are as follows:

- Recipient Type: Fax
- Name: Delia Diorio
- Fax Number: 603-890-1957
- Company: Delia's Delicatessen
- Business Phone: 603-328-1465
- E-mail: owner@deliasdelicatessen.biz
- Document Type: TIFF (image)

At the bottom of the dialog box are "OK" and "Cancel" buttons.

The following table provides guidelines on using each of these options.

**Table B-3: General properties of a fax recipient**

Feature name	Guidelines on using this feature	Additional information
Recipient Type	Not applicable.	AccuRoute Desktop automatically populates this information. It represents the recipient type that you selected when you added the recipient.
Name	Enter the name of the recipient. (This is optional.)	When you select a recipient from the address book associated with your mail program, AccuRoute Desktop uses the name associated with the contact record.  The name can appear on the Routing Sheet or cover sheet if one is included with your message, and if the Routing Sheet or cover sheet has been configured to display the recipient's name.
Fax Number	Verify that the fax number of the recipient is correct. (This is required.)	This is the official destination address used to deliver the message to the recipient.  The fax number can appear on the Routing Sheet or cover sheet if one is included with your message, and if the Routing Sheet or cover sheet has been configured to display the recipient's fax number.
Company	Enter the company name of the recipient. (This is optional.)	The company name can appear on the Routing Sheet or cover sheet if one is included with your message, and if the Routing Sheet or cover sheet has been configured to display the recipient's company name.

**Table B-3: General properties of a fax recipient**

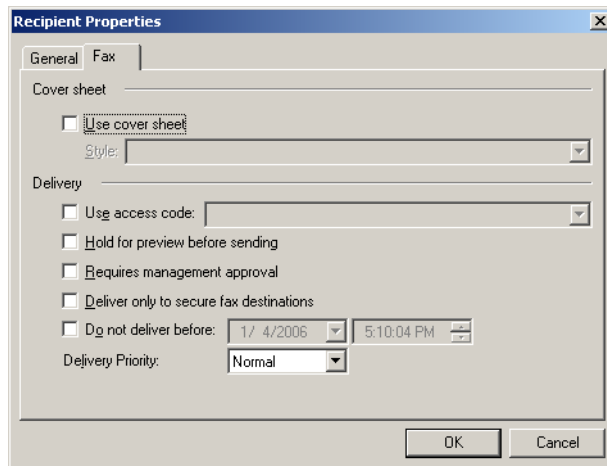
Feature name	Guidelines on using this feature	Additional information
Business Phone	Enter the business telephone number of the recipient. (This is optional.)	The business telephone number can appear on the Routing Sheet or cover sheet if one is included with your message, and if the Routing Sheet or cover sheet has been configured to display the recipient's business telephone number.
E-mail	Enter the e-mail address of the recipient. Verify that the e-mail address is correct. (This is optional.)	
Document Type	Not applicable.	<b>TIFF (image)</b> must be selected for this recipient type.

## Fax recipient > Fax properties

The fax properties of a fax recipient are shown here.

**Figure B-4: Recipient Properties dialog box showing Fax properties of a fax recipient**

Fax recipient properties include cover sheet settings and delivery options.



The following table provides guidelines on using each of these options.

**Table B-4: Fax properties of a fax recipient**

Feature name	Guidelines on using this feature	Additional information
<b>Cover sheet options</b>		
Use cover sheet	Select this option if you want to include a cover sheet when the message is delivered to the fax recipient. Then select a cover sheet style.	The cover sheet style determines the way the cover sheet looks and the information that appears on it.

**Table B-4: Fax properties of a fax recipient**

Feature name	Guidelines on using this feature	Additional information
Delivery options		
Use access code	Select this option if you want to include an access code that should be used to deliver the message to the fax recipient. Then enter or select an access code.	If you are required to provide a personal access code or group access code in order to place a toll call, then you might be required to provide an access code when you send a fax. If you are not sure whether you need to specify an access code for the recipient, consult a network administrator.
Hold for preview before sending	Select this option if you want to preview the message before it is delivered to the fax recipient.	<p>After you send a message with this option selected, you receive an e-mail message indicating that a preview of your message is available. A hyperlink allows you to see the preview, where you can send the message or cancel message delivery.</p> <p>This feature must be configured by a network administrator. If preview has not been configured for you and you select this option, message delivery fails.</p>
Requires management approval	Select this option if you want this message to be approved by a designated approval manager before it is delivered to the fax recipient.	<p>After you send a message with this option selected, one or more designated approval managers receives an e-mail message indicating that your message needs to be approved. As soon as an approval manager reviews the message and determines whether it is acceptable, you receive an e-mail message indicating the results of the approval process. If the approval manager did not approve your message, the e-mail message contains the approval manager's comments on why the message was not approved.</p> <p>This feature must be configured by a network administrator. If approval has been configured for you, it might be optional at your discretion or mandatory for all messages you send. If approval has not been configured for you and you select this option, message delivery fails.</p>
Deliver only to secure fax destinations	Select this option if you want this message to be delivered to the fax recipient only if the fax destination is secure.	<p>A secure fax destination means that only the intended recipient can view the contents of your document. Secure delivery is regulated in some industries.</p> <p>This feature must be configured by a network administrator. If it has not been configured and you select this option, message delivery fails.</p>
Do not delivery before [date and time]	Select this option if you want to specify the date and time when the message is delivered. Then set the date and time for delivery using the date menu and the time field.	This feature enables you to schedule message delivery in advance.
Delivery Priority	Select a delivery priority for your message.	<p>This setting is significant only when the overall message volume is high in your company.</p> <p>This feature allows you to downgrade the priority of your message to <b>LOW</b> if you do not want it to interfere with the normal, timely delivery of other messages going to and from your company, or to upgrade the priority of a message to <b>HIGH</b> if you want the message to be delivered as soon as possible. For example, if you are sending a broadcast fax to solicit new business for your company, you might want to set the priority to <b>LOW</b> so that delivery of your fax does not interfere with the delivery of normal business correspondence.</p>



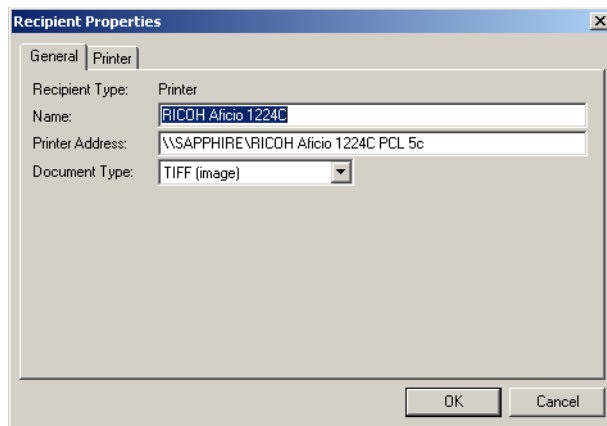
# Properties of printer destinations

## Printer destination > General properties

The general properties of a printer destination are shown here.

**Figure B-5: Recipient Properties dialog box showing General properties of a printer destination**

General printer destination properties include the recipient type, the printer name, the destination address, and the document delivery format.



The following table provides guidelines on using each of these options.

**Table B-5: General properties of a printer destination**

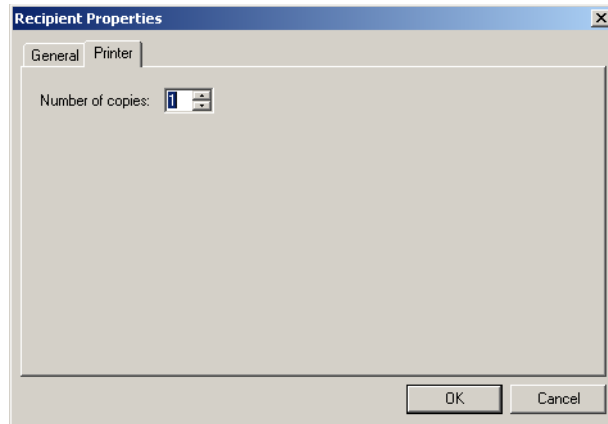
Feature name	Guidelines on using this feature	Additional information
Recipient Type	Not applicable.	AccuRoute Desktop automatically populates this information. It represents the recipient type that you selected when you added the destination.
Name	Not applicable.	AccuRoute Desktop automatically populates this information with the friendly name of a printer, if known locally, or the destination address of the network printer.
Printer Address	Verify that the printer destination address is correct. (This is required.)	This is the official destination address used to deliver the message to the printer.
Document Type	Not applicable.	<b>TIFF (image)</b> must be selected for this destination type.

## Printer destination > Printer properties

The printer properties of a printer destination are shown here.

**Figure B-6: Recipient Properties dialog box showing Printer properties of a printer destination**

Printer destination properties include the number of copies.



The following table provides guidelines on using each of these options.

**Table B-6: General properties of a printer destination**

Feature name	Guidelines on using this feature	Additional information
Number of copies	Indicate the number of copies that the printer should generate. Enter the number in the field or use the spin box to increase or decrease the number.	

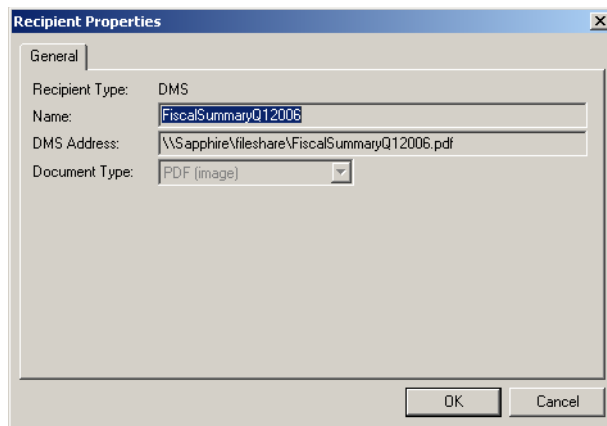
# Properties of DMS destinations

## DMS destination > General properties

The general properties of a DMS destination are shown here.

**Figure B-7: Recipient Properties dialog box showing General properties of a DMS destination**

General DMS destination properties include the recipient type, the name of the document being distributed to the DMS application, the address of the document destination, and the document delivery format.



The following table provides guidelines on using each of these options.

**Table B-7: General properties of a DMS destination**

Feature name	Guidelines on using this feature	Additional information
Recipient Type	Not applicable.	AccuRoute Desktop automatically populates this information. It represents the recipient type that you selected when you added the destination.
Name	Not applicable.	AccuRoute Desktop automatically populates this information. It represents the name of the file that will be routed to the DMS destination.
DMS Address	Not applicable.	AccuRoute Desktop automatically populates this information. It represents the DMS destination where the file will be routed.
Document Type	Not applicable.	AccuRoute Desktop automatically populates this information. It represents the recipient type that you selected when you added the destination.

Appendix B:

# Glossary

## **AccuRoute message**

A message you send using AccuRoute Desktop.

## **AccuRoutePDF printer**

When you print a document on the AccuRoutePDF printer, AccuRoute Desktop instantly converts the document into a PDF file and attaches the PDF file to a new AccuRoute message. (Go to [Using the AccuRoutePDF printer](#) on 2-18.)

## **approval**

Go to [management approval](#) on 1-3.

## **access code**

A number, or string of numbers, that enables you to make a long distance telephone call on your company's telephone system. When you send a fax, you might be required to provide your access code. Ask your network administrator if you have questions on this feature.

## **address book**

The address book associated with your e-mail program. For example, if Microsoft Outlook is your mail application, the address book refers to the Microsoft Outlook address book where your contacts are stored. As you use AccuRoute Desktop, you can select recipients from your address book.

## **attachment**

A file that is attached to an AccuRoute message. When sending simple messages, you can attach files the same way you would attach files to an e-mail message. When you save message settings as an Embedded Directive, all file attachments are saved with the message so that the attachment becomes permanently associated with the Embedded Directive.

## **comments**

Comments for the recipient.

When your AccuRoute message is delivered with a Routing Sheet or cover sheet, your comments for the recipient might be displayed on the Routing Sheet or cover sheet. This depends on whether your network administrator has configured the Routing Sheet or cover sheet to display comments.

When the AccuRoute message is sent to an e-mail recipient, your comments are included in the body of the e-mail message.

**configuration folder**

Folder where AccuRoute Desktop configuration files are located. Configuration files include Routing Sheet style templates and view files. Depending on how AccuRoute Desktop has been configured, you might be able to add or remove configuration folders.

**confirmation**

An e-mail message that provides you with delivery status information about an AccuRoute message you sent using AccuRoute Desktop. Sometimes confirmations are also called notifications.

**connection**

Represents the network connection from your computer to an application server. All computers running AccuRoute Desktop must connect to a server running AccuRoute. The server running AccuRoute might also be called the AccuRoute server.

**cover sheet**

A cover page for an AccuRoute message that is sent to a fax number.

**cover sheet style**

The style of the cover page that accompanies an AccuRoute message. The style determines how the cover sheet looks when it is delivered to the recipient.

**delivery priority**

The priority of an AccuRoute message. Priority determines the order in which the AccuRoute application server handles all the AccuRoute messages in your company.

For common AccuRoute messages and Embedded Directives, use Normal as the delivery priority. Ask your network administrator if you have questions on this feature.

**destination**

Destination address of the AccuRoute message. The destination can be an e-mail address, a fax number, a printer, a document management application, or a location in the network.

**distribution list**

An entry in your address book that represents a group of recipients. For example, if your address book includes the distribution list "Marketing", this list would likely include all the members of the marketing department.

**DMS**

Acronym for "document management system". Also represents similar applications such as records management systems and document repositories.

**document format**

The file format in which your AccuRoute message is sent. For example, if the format of the message is PDF for an e-mail recipient, the recipient receives an e-mail message with your AccuRoute message attached as a PDF file.

**ED**

Acronym for Embedded Directive.

**Embedded Directive**

An Embedded Directive is a document distribution profile that includes the recipients, destinations, and other settings in AccuRoute Desktop.

**expires after**

The date when an Embedded Directive becomes invalid, meaning that it can no longer be used. In AccuRoute Desktop, you can set the expiration date when an Embedded Directive becomes invalid.

**format**

Go to [document format](#) on I-3.

**management approval**

An approval process for an AccuRoute message. When a message requires management approval, a designated approval manager must review the message and determine whether it is suitable for delivery. When a message is approved, it is delivered automatically. When a message is declined, it is not sent. You must resubmit the message if you want to send it again.

Any time an AccuRoute message is sent into this approval process, you receive an e-mail notification message that indicates whether the approval manager accepted or declined your message. If the approval manager provided any feedback on the message, the notification message displays these comments.

This feature must be configured by a network administrator. Depending on how it is configured, approval might occur automatically with all AccuRoute messages you send, or it might be an optional feature that you can select at your own discretion.

**message**

Go to [AccuRoute message](#) on I-1.

**message options**

Additional options that you can select when creating an AccuRoute message.

**My AccuRoute**

An advanced feature of AccuRoute Desktop. When configured, all AccuRoute messages you send using a Routing Sheet are distributed using a specific Embedded Directive, or distributed to your e-mail address.

**preferences**

Settings that determine the options that are selected by default whenever you start AccuRoute Desktop.

**preview**

A preview of an AccuRoute message. When a message requires preview, you (the sender) must review the message and determine whether it is suitable for delivery. If you accept the message, it is delivered automatically. If you reject the message, it is not sent. You must resubmit the message if you want to send it again.

Any time an AccuRoute message is sent into this preview process, you receive an e-mail notification message that indicates when the message is ready to be previewed. The e-mail message contains a link to the AccuRoute message. When you follow the link, you immediately view the message and can accept or decline it.

This feature must be configured by a network administrator. Preview is always optional; select it at your own discretion.

**recipient type**

Describes the type of destination for the recipient. For example, if the destination for the AccuRoute message is an e-mail address, then the recipient type is E-mail.

**Routing Sheet**

A printable page that AccuRoute Desktop generates from an Embedded Directive. The page contains a special code (a string of letters and numbers) that represents the routing instructions for the AccuRoute message.

When you want to send an AccuRoute message from a network scanner, print the Routing Sheet so you can include it with your scan.

**Routing Sheet style**

The style of the Routing Sheet that accompanies an AccuRoute message. The style determines the appearance of the Routing Sheet and the information appears on it.

**RS**

Acronym for "Routing Sheet".



**secure fax destination**

A fax destination that is secure, meaning only the intended recipient can view the information as it is being transmitted and printed on the receiving fax machine. When you designate that an AccuRoute message can be delivered only to secure fax destinations, the recipient must first complete a registration form that functions as a confidentiality agreement between the sender and the recipient. After the recipient completes and returns the registration form, the destination is considered secure and the recipient receives the fax you sent momentarily.

**sender information**

Information about the sender that gets saved with the Embedded Directive.

**Send to AccuRoute Desktop**

When browsing the files on your computer and in your network, you can select a file and send it to AccuRoute Desktop. (The Windows right-click menu option is called Send to AccuRoute Desktop.) Then, using AccuRoute Desktop, you can create an AccuRoute message.

**single use**

A feature associated with Embedded Directives. When you select the Single Use option for an Embedded Directive, the Embedded Directive can be used only once.

**subject**

The subject of the Embedded Directive.

When your AccuRoute message is delivered with a Routing Sheet or cover sheet, the subject might be displayed on the Routing Sheet or cover sheet. This depends on whether your network administrator has configured the Routing Sheet or cover sheet to display the subject.

When the AccuRoute message is sent to an e-mail recipient, your subject is included as the subject of the e-mail message.

**template**

A file that stores the settings you use to create AccuRoute messages, Embedded Directives, and Routing Sheets.

**tray application**

An application that you can access from the task tray in the bottom right corner of your screen.

**view**

A view is a set of AccuRoute Desktop settings that determine the features you see on your screen and the AccuRoute Desktop features that are available for your use.

**Watch Folders**

An application that enables you to send AccuRoute Desktop messages by copying files into a folder.  
(Go to [Using Watch Folders](#) on 4-4.)